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ABSTRACT

This guidebook describes procedures followed by National Diffusion Network (NDN) certified trainers when they are helping to disseminate information about the NDN or when they are helping school personnel adopt an NDN program or practice. It is noted that, because NDN certified trainers can help in information dissemination and program implementation in many ways, all processes used by certified trainers are not described in this guidebook and that those described are not necessarily used in each case. Material is organized according to a set of components generic to certified trainer systems: (1) identifying; (2) training; (3) certifying; (4) funding; (5) supporting; (6) coordinating; (7) recertifying; and (8) evaluating. In the first section, an overview describes the guidebook's audiences, purposes, and contents and defines certified trainers and certified trainer systems. The current status of certified trainers and certified trainer systems is also discussed. Section 2 lists project assessment procedures, the results of which are used in the design or refinement of a certified trainer system, the topic of section 3. The fourth section contains descriptions of strategies for use in certified trainer systems. Section 5 highlights and discusses several important issues concerning certified trainers and certified trainer systems. The sixth section is an appendix, containing information about: (1) certified trainer operations; (2) criteria for identifying certified trainers; (3) problems, issues, and learnings involving certified trainers; and (4) selected references on dissemination. (CJ)

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CERTIFIED TRAINER SYSTEMS in the NATIONAL DIFFUSION NETWORK

A GUIDEBOOK FOR EDUCATIONAL DISSEMINATORS

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SP 021 547

Technical Assistance Base
National Diffusion Network

NDN TAB

CERTIFIED TRAINER SYSTEMS
IN THE
NATIONAL DIFFUSION NETWORK

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A GUIDEBOOK FOR EDUCATIONAL DISSEMINATORS

* * *

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Produced by The NETWORK, Inc., Andover, Mass., for the
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Section 4: STRATEGIES

This section contains descriptions of strategies for use in certified trainer systems. The strategies are organized according to the components of a system:

IDENTIFYING
TRAINING
CERTIFYING
FUNDING
SUPPORTING
COORDINATING
RECERTIFYING
EVALUATING

Each strategy is presented in a standard format containing a description of the strategy, considerations for its use, and resources from which more information can be obtained. A comprehensive list of critiera used by D/D projects for selecting certified trainers can be found in the Appendix.

Most of the strategies included here are currently in use in the NDN, although some have been suggested by NDN members.

IDENTIFYING

COMPONENT: IDENTIFYING

STRATEGY:

Trainers selected from among adopting teachers.

DESCRIPTION:

Many projects use criteria such as the following for selecting teachers to become certified trainers:

- have successfully taught the program for at least one year (sometimes two);
- demonstrate skills in teaching and training;
- be committed to the program; and
- possess personality traits compatible with training (e.g., warmth, good communication, sense of humor, leadership, etc.).
- be recommended in writing by SF, colleagues, and supervisors.

The D/D either picks nominations in advance from the adopting districts and/or looks for "stars" during training.

APPLICATION CONSIDERATIONS:

- Teachers learn best from other teachers: as trainers, teachers can provide first-hand experience with the program to trainees.
- It may be difficult for teachers to draw back enough from their *own* use of a program to demonstrate to someone else how he or she can use it.
- Release time for training activities is often difficult to arrange, and should be negotiated before teacher is trained as a CT.
- Compensating teachers to serve as CTs can present a problem if teachers are paid full time by their district; should be determined before adopter considered as a CT.
- Especially applicable when D/D wants to have demonstration sites.
- Release time arrangements should be negotiated with administrators *before* final selection and training.
- Classroom teachers may need help modifying presentation style from children to adults.
- District staff may need orientation to NDN and adoption process to present project in this context.
- Offers teachers a positive professional development opportunity.

RESOURCES:

PASS
PERCEPTION +
IRIT
Project INSTRUCT
ECRA
Project COPE
Diagnostic Prescriptive Arithmetic
ACTIVE
Project Adventure
Student Team Learning

COMPONENT: IDENTIFYING

STRATEGY:

Trainers selected from among adopter site supervisors/administrators, or regional service units (RSUs)*.

DESCRIPTION:

Supervisors (e.g., district reading coordinator, staff development coordinator) and RSU staff must meet some or all of the following criteria for selection:

- demonstrated leadership among teachers;
- knowledge of relevant content area (e.g., reading, mathematics, early childhood, special education);
- classroom experience;
- training experience;
- experience in implementing the program in their district;
- availability for travel; and
- possess personality traits compatible with training (see S-1).

APPLICATION CONSIDERATIONS:

- Helpful in working with administrators in adopting districts.
- Lack of experience teaching in the program sometimes affects credibility.
- Administrators often have more flexible schedules than teachers.
- If preparation of trainer includes classroom observation or teaching "practicum," credibility problems may be reduced.
- Trainers should be provided with concrete examples of project application.
- Clarity about pay-off to district and individual helps avoid problems of motivation and support.
- District staff may need orientation to NDN and adoption process to present project in this context.
- Administrators can provide input to colleagues in adopting districts about management/administration issues.

RESOURCES:

Project NAIL
IRIT
Student Team Learning

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*This does not refer to TAB-RSUs

COMPONENT: IDENTIFYING

STRATEGY:

Trainers selected from State Facilitator projects.

DESCRIPTION:

Staff of many SF projects have become CTs for one or more D/Ds. Typically they have taken the initiative to do so when demand for a particular project is high in their state.

SF trainers must meet the following criteria for selection:

- background in relevant content area(s);
- experience with an adopting site in implementing the program;
- experience in training; and
- personality traits compatible with training (see S-1).

APPLICATION CONSIDERATIONS:

- This strategy raises the question of whether the SF will fairly and equitably represent all D/D projects or will tend to favor the one(s) he or she is certified in.
- Helps keep both D/D and SF costs down -- keeps it "in the family."
- Tends to foster greater demand for project because SF knowledgable about and committed to project.
- SFs often have excellent training skills.
- SFs may be involved with too many other projects and functions to be maximally effective with each.
- SF staff lack adopter (implementation) experience. This may be a problem for complex programs.
- Can recruit SF trainers from states where demand is low in order to increase it, or from states where demand is high in order to meet it.
- Turf issue needs to be considered if SF is used in states other than their own.
- Reimbursement from D/D only permitted if SF staff is less than 100% time.

RESOURCES:

Perception +
ILA
EBCE
Massachusetts SF

COMPONENT: IDENTIFYING

STRATEGY:

Trainers selected from university personnel.

DESCRIPTION:

University personnel must meet the following criteria for selection:

- concordant philosophy with the program and methodology;
- experience with the program;
- background in the relevant content area;
- teaching experience;
- available time;
- knowledge of school policy and procedures; and
- personality traits compatible with training (see S-1).
- access to classrooms to "try out" project methods.

APPLICATION CONSIDERATIONS:

- Classroom teacher trainees are often leary of training conducted by university folk.
- Academics with limited classroom experience in general and with D/D project in particular may have limited credibility.
- Academics can often effectively refer to current research supporting the project's approach.
- Usually fairly flexible for scheduling.
- Can teach the project as a pre-service course.
- Have access to many potential adopters through course catalogues.
- Content specialists may need help understanding adoption/educational change process.
- Because they are removed from the operation of the project and other trainers, may need more sharing opportunities and support.
- University credit can usually be easily arranged.

RESOURCES:

Elsmere
Comprehensive School Mathematics Program
ACTIVE
Student Team Learning
Project Adventure
New Jersey Writing Project

COMPONENT: IDENTIFYING

STRATEGY:

Use CTs from similar D/D projects.

DESCRIPTION:

The D/D who cannot cover his or her need for CTs from adopter sites may find good candidates in CTs from similar D/D projects.

APPLICATION CONSIDERATIONS:

- Many CTs currently serving D/D projects have excellent training skills.
- "Free-lance" trainers may welcome more work.
- Many projects require similar content background.
- Should be coordinated with D/Ds to get recommendation, clarify ownership issues.

RESOURCES:

TRAINING

certified training strategy

COMPONENT: TRAINING

STRATEGY:

Module training by function (Awareness, Training, Follow-Up).

DESCRIPTION:

CT applicants indicate their interest in being certified to perform Awareness, Training, or all three functions. If the CT only wants to do awareness, the training program consists of observing at the D/D (or demonstration) site and observing one or more awareness sessions.

APPLICATION CONSIDERATIONS:

- Attending awareness sessions can be very expensive; some projects use CTs for this function only in order to reduce time and travel demands on D/D.
- CT may not have in-depth understanding of project (unless he or she is an adopter).
- Adopters often want same person to do training whom they met at awareness session.

RESOURCES:

NDN TAB

COMPONENT: TRAINING

STRATEGY:

Individual CTs trained at D/D site.

DESCRIPTION:

The CT is trained 1:1 at the D/D site. The training program includes:

- orientation to the program,
- observation of demonstration classrooms,
- supervised demonstration teaching in classrooms,
- feedback on instructional techniques, and
- orientation to training techniques.

Training lasts 2-5 days.

APPLICATION CONSIDERATIONS:

- Actively participating in the original project enriches understanding of the trainer.
- Demonstration teaching and feedback especially valuable for CTs who are not program adopters.
- D/D site must be prepared to handle influx of trainees and training activities with minimal disruption.
- Works best when D/D site is set up as a demonstration site -- for adopters and trainers.

RESOURCES:

Perception +
Teaching Research
ILA

COMPONENT: TRAINING

STRATEGY:

Side-by-Side training followed by Refresher Training.

DESCRIPTION:

Potential CTs train side-by-side with D/D staff in at least two 3-day field experiences during their "provisional" CT status. Once a year, all CTs are brought together with the D/D for a 3-day refresher training course, during which the content and style of each CT's training is reviewed for consistency with the D/D approach. A trainer is not considered certified until s/he has participated in a refresher training session.

APPLICATION CONSIDERATIONS:

- Modeling and co-training helpful to both D/D and CT.
- Effectively ties training to certification.
- Expensive in time and money (especially if CT is paid for training time).
- Emphasizes importance of continuing training.
- Most appropriate for complex projects when CTs used for training and follow-up.
- Provides strong mechanism for support and coordination.

RESOURCES:

VRP
COPE

COMPONENT: TRAINING

STRATEGY:

Associate Trainer Status

DESCRIPTION:

This strategy uses a three-step training sequence for CTs, over the course of a year. The steps are:

- a 4 day Associate Trainer training workshop for potential CTs that includes training and technical assistance strategies.
- designation as "Associate Trainer" for a particular district. The Associate provides assistance to in-district adopters, trains new teachers, and conducts awareness presentation;
- successful completion of a "2nd generation" training session of 1-1/2 days that prepares Associates to work outside their district as certified trainers. Associates must pass a post-test administered during the training in order to become certified.

APPLICATION CONSIDERATIONS:

- Emphasizes importance of quality training developed over time.
- Heavy investment in CT, but gradually involved in conducting training during progression toward certification.
- Costly if CT only used for awareness.
- Especially applicable to complex projects that tend to be heavily adapted.

RESOURCES:

PEGASUS-PACE

COMPONENT: TRAINING

STRATEGY:

CT candidate attends three regular training sessions and one awareness session as a participant observer.

DESCRIPTION:

The CT candidate prepares for the session by reviewing project materials and talking with project staff. After participating in each session, the candidate debriefs with the trainer to review session content, dynamics, instructional methods, and questions.

APPLICATION CONSIDERATIONS:

- Requires excessive release time if candidate is an LEA.
- Places great emphasis on the training program -- especially good for projects that have complex training programs.
- Repeat participation often illuminates aspects of the project and the training program that might have been missed first time.

RESOURCES:

certified training strategy

COMPONENT: TRAINING

STRATEGY:

SF participates in training for CTs.

DESCRIPTION:

The SF helps plan the training program and assumes responsibility for parts of it, especially information on the NDN and procedures for working with adopters.

APPLICATION CONSIDERATIONS:

- Helps build an in-state team.
- SF can often help negotiate CT release time with district.
- Especially useful if SF is trying to develop training capability in-state because a particular project is very popular.

RESOURCES:

Massachusetts SF

CERTIFYING

COMPONENT: CERTIFYING

STRATEGY:

"Minimum Requirements"

DESCRIPTION:

All projects that use certified trainers have established some minimum requirements for certification that include:

- meeting the selection and training requirements of the CT program (see previous sections),
- receiving D/D approval, or formal authorization to serve as a CT,
- securing written approval from the CT's school district (if applicable) to be a trainer, and
- signing a Training Agreement with the D/D. This Agreement is generally valid for 1-2 years.

APPLICATION CONSIDERATIONS:

- Establishes "baseline" to which other requirements can be added -- permits flexibility.
- Variation: D/D specifies "desirable" and "ideal" conditions as goals beyond minimum (essential) conditions.
- Provides for commitment from CT and school district.
- Requirements should be presented early in the selection process.
- Minimum requirements should be clearly stated in writing. Areas of misunderstanding or potential problems should be identified early.

RESOURCES:

CSMP
FOCUS
Pre-Algebra
INSTRUCT
CAP
Urban Arts

PASS
Project Adventure
Student Team Learning
Rutland Center
Project NAIL
Every Child a Winner

COMPONENT: CERTIFYING

STRATEGY:

Minimum Requirements Plus State Facilitator Approval.

DESCRIPTION:

Projects that use this strategy apply all the minimum requirements listed under C-1 and, in addition, require approval of the CT's home state SF project, for final certification.

APPLICATION CONSIDERATIONS:

- SF may have very limited information from which to make a judgment.
- Involves SF in process -- important since SF must have confidence in CT in order to encourage adoptions.
- May be too limiting to give veto power to SF -- D/D can ask SF to identify any problem areas regarding his or her use of SF in the state.
- May need mechanism for acquainting SF with potential CT prior to seeking approval.

RESOURCES:

VRP
Perception +
Early Prevention of School Failure

COMPONENT: CERTIFYING

STRATEGY:

Minimum Requirements plus Application, Resume, and References and Documented Local Need.

DESCRIPTION:

Projects that use this strategy require, in addition to the minimum requirements described under Ce-1:

- a letter of application from each CT,
- a resume, and
- personal and professional references, before a trainer can be certified.
- letters of support for CT by adopters.

APPLICATION CONSIDERATIONS:

- These steps add to the sense of importance and professionalism associated with being a certified trainer.
- This information can be helpful in introducing the certified trainer to SFs, potential adopters, etc.
- May be (or be viewed as) bureaucratic red tape.
- Support letters pinpoint need for CT, and identify whether the certification is worth the D/D's time and money in terms of potential adoptions.
- Clear sense of how information will be used should be developed before information sought.
- Application form and request for references should be structured carefully to obtain desired information.

RESOURCES:

DPA
ECRI
ACTIVE

COMPONENT: CERTIFYING

STRATEGY:

Apprenticeship/Provisional Certification

DESCRIPTION:

This strategy has many variations as practiced by D/Ds, but in each case it includes:

- affirmation that the potential certified trainer has participated in the adoption training program and in any CT training program.
- an "apprenticeship" or supervised field experience of up to a year's duration, during which the CT co-trains with D/D staff, works with adopters, makes supervised presentations, and is observed by D/D staff (certification is provisional during this period); and
- a post-apprenticeship evaluation of the CT performance.

APPLICATION CONSIDERATIONS:

- Emphasizes performance over credentials.
- Builds in quality control and on-going training/improvement by making approval contingent.
- Especially important for projects that are complex where modeling of techniques is an important means of communicating subtleties.

RESOURCES:

PASS
CAP
Adventure
IRIT
FOCUS
INSTRUCT
Urban Arts
Student Team Learning
NAIL
Elsmere
COPE

COMPONENT: CERTIFYING

STRATEGY:

Testing

DESCRIPTION:

As part of the certification process, some D/Ds have developed a test that prospective CTs are asked to complete. The tests cover areas such as:

- program content (key elements),
- program procedures (i.e., student identification, documentation, educational planning, establishing interdisciplinary teams),
- instructional methods,
- the NDN: goals, organization, roles of SFs and D/Ds,
- dissemination/adoption principles.

APPLICATION CONSIDERATIONS:

- The test can serve as an instructional tool, helping CTs become better acquainted with their responsibilities.
- Any such test should relate directly to the training of CTs.
- Rather than treating it as a "pass-fail" situation, provision should be made to help otherwise promising CTs acquire information they don't have.
- Best used in conjunction with other measures, such as observation of training skills, references, adequate background, subjective assessment.
- Can be developed as a competency assessment.

RESOURCES:

Oklahoma CSDC

FUNDING

F-1

COMPONENT: FUNDING

STRATEGY:

State Facilitators sponsor CT costs.

DESCRIPTION:

SFs pay honorarium and expenses for CTs who are used primarily for training (rather than for awareness or follow up) purposes.

APPLICATION CONSIDERATIONS:

- SF has legitimate interest in being certain CT is best trainer available, works well with SF in preparing and scheduling training, and is reliable.
- Some SF budgets preclude this; rigid adherence to this policy may limit project participation in particular states.
- Can encourage close coordination among SF, D/D, and CT.
- D/D may need to arrange clear channels among project, CT, and SF to ensure contact does not circumvent the D/D.
- Determining SF involvement in certifying trainers and evaluating effectiveness should be done early.

RESOURCES:

Perception +

COMPONENT: FUNDING

STRATEGY:

D/Ds support CT costs.

DESCRIPTION:

D/D pays CTs a daily rate and reimburses them for travel expenses from a consultant line in their budget. D/D and CT negotiate a daily rate and allowable expense in advance.

APPLICATION CONSIDERATIONS:

- Many D/D budgets too limited to use this as a primary strategy.
- Does not take full advantage of other funding sources -- might unnecessarily restrict number of adoptions.
- Control remains more firmly with D/D.
- Strong evidence that parties assuming costs are more invested in outcomes.
- Consideration should be given to who pays other training costs -- materials, release time, facilities.

RESOURCES:

East St. Louis Follow Through
Urban Arts
Elsmere
CHILD
RER
Seaport

COMPONENT: FUNDING

STRATEGY:

Adopters support CT costs.

DESCRIPTION:

Adopters are expected to cover CT cost, for the most part, using district funds, grant sources, state support, etc.

APPLICATION CONSIDERATIONS:

- Assures LEA support for adoption.
- Adopter may be reluctant to invest so heavily before results of training are seen.
- Consultant budgets of LEAs often very limited.
- Variation: all assignments are contracted by D/D. D/D retains cut of honorarium for legitimate management functions.
- Many adopter sites would benefit from help in tapping range of funding sources.

RESOURCES:

Early Prevention of School Failure
ILA
MARC

COMPONENT: FUNDING

STRATEGY:

Adopters, SFs, and D/D share costs.

DESCRIPTION:

Projects use this strategy in several variations:

- PEGASUS-PACE provides materials while the adopter and SF share training costs;
- NAIL provides a small honorarium for planning time while adopters pay all training costs;
- IRIT, its adopter and the adopter's SF negotiate cost-sharing in advance of training.

APPLICATION CONSIDERATIONS:

- All interested parties have a stake in the outcome.
- Takes advantage of each party's ability to provide financial support for various training costs.
- Reinforces coordination among all parties.
- Can result in complex arrangements for reimbursement.
- If cost sharing negotiated on a case-by-case basis, SFs can raise question of consistency.

RESOURCES:

PEGASUS-PACE
NAIL
IRIT

COMPONENT: FUNDING

STRATEGY:

Adopter seeks grant money to support CT costs.

DESCRIPTION:

Grant funds are sought as the primary source of funding for training. In some cases, demonstration sites (as well as trainers) have been certified by projects. These certified sites have received Title IV-C grants to support their demonstration and CT activities within the state. In one case, career education grants to LEAs are used to cover CT costs.

APPLICATION CONSIDERATIONS:

- Promotes good cooperation between NDN and IV-C.
- Requires good knowledge of state funding sources.
- Different sources for different types of projects (i.e., career education, special education, basic skills).
- Grants often require evolution or progress report data as a stipulation for payments. This is an incentive to provide good data to the D/D.
- D/D must stay informed about application requirements, deadlines.
- Adopters often need help preparing applications.

RESOURCES:

CAP
ILA
STAMM
Georgia SF
Massachusetts SF

COMPONENT: FUNDING

STRATEGY:

A combination of sources support CT costs

DESCRIPTION:

Many projects use a variation of this strategy. Sources include:

- D/D funds;
- SF funds;
- Title IV-C grants to adopters (Project Adventure, VRP, Student Team Learning;
- Adopter funds;
- University assistantships (PEECH); and
- Special project funding, usually available through the state, such as funding for gifted and talented projects (Student Team Learning).

APPLICATION CONSIDERATIONS:

- As funding availability shifts, projects set up to tap multiple sources remain flexible.
- Requires extensive time tracking sources and remaining informed of requirements and deadlines.
- Timing can be a problem if project wants to respond to requests quickly and funding arrangements are complex.
- Works best when carefully planned for, so necessary staff time can be allotted.
- Requires establishing contact and maintaining coordination with many agencies.

RESOURCES:

PEECH
Student Team Learning
VRP
Project Adventure
CSMP

COMPONENT: FUNDING

STRATEGY:

SF arranges funding from professional association or special interest group for statewide services.

DESCRIPTION:

Many D/D projects emphasize an area covered by a professional association or special interest group. The SF contacts these organizations to get their support for sponsoring awareness or training sessions throughout the state. The Pennsylvania Facilitator/R.I.S.E. has arranged for the American Lung Association, working through state and local lung associations, to provide financial and organizational support for the School Health Curriculum Project (SHCP) and the Primary Grades Health Curriculum Project (PGHCP). The Pennsylvania Department of Health, Department of Education, and the Facilitator, in cooperation with lung agencies, arranged ten SHCP awareness sessions at sites throughout the state. Audiences included school nurses, representatives of health service groups, and representatives of the PTA, which is providing additional support.

APPLICATION CONSIDERATIONS:

- Builds demand for projects so that D/D or CT can train several adoption sites at once.
- Creates a strong link among local districts, NDN, SEA, community groups and/or businesses that can be tapped for other purposes.
- Variation: SF contacts large businesses to help them plan link between private sector and education through sponsoring school improvement services.

RESOURCES:

COMPONENT: FUNDING

STRATEGY:

SF assists adopters in developing funding sources.

DESCRIPTION:

As part of their role, many SFs help adopters identify possible funding sources. These may include Title IV-C adopter grants, Title I grants, migrant education funding, local community groups or businesses, foundations, state inservice money.

APPLICATION CONSIDERATIONS:

- Permits use of varied methods depending on the area.
- Takes burden of funding adoptions off the shoulders of D/Ds.
- SFs often have good contacts in state, particularly in the SEA.

RESOURCES:

Tennessee SF
Michigan SF
Missouri SF
Wisconsin SF
Georgia SF

COMPONENT: FUNDING

STRATEGY:

Costs of training CTs kept low by piggybacking on adopter training.

DESCRIPTION:

A major part of preparing certified trainers often is participation in adopter training. The D/D adds one or two days to workshop for adopters to complete CT training.

APPLICATION CONSIDERATIONS:

- If CTs come from adopting districts, potential CTs can be identified in advance and invited to participate in adopter training in their district or nearby.
- Cuts training and travel costs.
- CT can observe model training session with immediate chance to apply it (through practice activities in subsequent CT training).
- Needs to be carefully planned to be sure good people are identified, they are prepared to observe training, and able to get what they need.

RESOURCES:

Project Catch-Up

COMPONENT: FUNDING

STRATEGY:

SF pays for training of CTs.

DESCRIPTION:

The SF agrees to pay for training certified trainers in his or her state. The SF works with the D/D to plan the training, often in conjunction with adopter training in the state.

APPLICATION CONSIDERATIONS:

- Since the SF is often asked to pay the D/D's expenses for conducting training programs in the state, paying for having CTs trained is a good investment, since they will then be available and travel costs will be minimized.
- Variation: the SF who becomes a CT for a project usually pays for his or her training.
- SF can be involved in identifying potential CTs within the state.

RESOURCES:

Minnesota SF
Wisconsin SF

COMPONENT: FUNDING

STRATEGY:

D/D exchanges training services for later CT services.

DESCRIPTION:

The D/D agrees not to charge a training fee if adopter agrees to help identify a certified trainer, allows that person to participate in CT training, and do two training sessions for other adopters.

APPLICATION CONSIDERATIONS:

- Variation: fee is suspended when adopter agrees to be a demonstration site (instead of or in addition to supplying a certified trainer).
- Adopter payment is a primary strategy for funding training. This strategy expands the benefits even further.
- Especially applicable to D/Ds who are just starting to use CTs.

RESOURCES:

COMPONENT: FUNDING

STRATEGY:

Certified Trainer candidates cover their own expenses to be trained.

DESCRIPTION:

Serving as a certified trainer is a valued professional development opportunity for many individuals. In addition, for many it represents supplement to their income. Many certified trainers cover their own expenses to become certified.

APPLICATION CONSIDERATIONS:

- Assures a real commitment on the part of the CT.
- Incentives can be increased through graduate credits, district/agency recognition.
- Should be clear that participation in training does not guarantee certification.

RESOURCES:

ECRI

COMPONENT: FUNDING

STRATEGY:

Potential CT applies for grant funding.

DESCRIPTION:

In districts where there is interest in a D/D project and no funds to support the training, an individual teacher can submit a grant application that covers the training of that teacher as a CT so he or she can train others in the district.

APPLICATION CONSIDERATIONS:

- May involve only release time financial support rather than CT fee or D/D travel.
- Builds valuable capability in district -- variation is to have more than one teacher become certified.
- Requires extended commitment from district.
- Teacher may need help with grant application from D/D, SF, or district staff.

RESOURCES:

SUPPORTING

COMPONENT: SUPPORTING

STRATEGY:

Combination of long-distance support strategies.

DESCRIPTION:

Most projects that have CT systems use long-distance contact of some sort to schedule activities; provide consultation and problem-solving support; provide materials for awareness, training and follow-up activities; and help the CT feel connected to the project. Long distance activities include:

- sending project or NDN newsletters,
- sending project materials,
- providing updates on any modifications in project materials or techniques,
- preparing monthly calendar (RER),
- giving CTs project shirts and hats (Project Adventure), and
- maintaining regular telephone contact.

APPLICATION CONSIDERATIONS:

- Multiple strategies expand both frequency and modes of contact/support.
- Individualized strategies (i.e., telephone contact) time consuming when there are a lot of CTs.
- "Mass media" strategies -- mailings -- low cost in time and money but keep project "alive."
- Frequency of contact seems to directly relate to feeling connected to and supported by project.
- Too frequent distribution of extensive information may seem like a burden to CTs and defeat the purpose.
- "Mass media" strategies should be targeted to needs and interests of CTs, concise, interesting, informative.

RESOURCES:

Student Team Learning
PEECH
East St. Louis Follow Through
CAP
Project Adventure
RER
Focus
CSMP
U-SAIL

COMPONENT: SUPPORTING

STRATEGY:

Annual group events for CTs.

DESCRIPTION:

This strategy involves an annual, structured meeting, usually at the D/D site, for all CTs. It is formally designated:

- an Annual Leadership Conference (Early Prevention of School Failure),
- an Annual CT conference (Focus, VRP), or
- a D/D Site Meeting (Rutland Center Family-Oriented Structured Pre-School Activity).

The purposes of these group events are to

- regenerate CT enthusiasm about the project,
- update CTs on any changes in the project,
- share experiences,
- check consistency of training across trainers, and if necessary,
- recertify trainers.

APPLICATION CONSIDERATIONS:

- Face-to-face group contact permits more intensive communication and sharing than any other means.
- Expensive in terms of travel, time of CTs and staff (particularly if CTs are reimbursed for time).
- Variation: an informal gathering of CTs at a professional meeting or conference (NAIL).
- Meeting must be carefully planned to achieve objectives and justify time and money invested.
- Gathering input from CTs in advance invaluable in planning.

RESOURCES:

Rutland Center
Early Prevention of School Failure
NAIL
Family Oriented Structured Pre-School Activity
VRP
Focus

COMPONENT: SUPPORTING

STRATEGY:

CT site meetings.

DESCRIPTION:

These meetings are generally 1:1 D/D to CT and occur on an as-needed, but at least annual basis. They are held at the CT's site for several purposes:

- as an alternative to an annual group event (see Su-2), with a similar "agenda" to the group meetings, or
- as a more informal courtesy call when the D/D is in town or traveling nearby (Family Oriented Structured Pre-School Activity).

APPLICATION CONSIDERATIONS:

- Excellent means of observing CT and site.
- Promotes individualized support and assistance.
- Learnings from individual meetings can be tested and applied to other visits.
- Appropriate only for projects that have CTs at demonstration sites.
- Can be done as CT is in vicinity of D/D project (CT visits D/D site).
- SF can be used to meet with CT when in state if good working relationship established between project, SF, and CT.
- Though less formal than group meetings, they still need careful planning and structuring.

RESOURCES:

Urban Arts
Family Oriented Structured Pre-School Activity
MARC
PASS

COMPONENT: SUPPORTING

STRATEGY:

SF helps develop demonstration site.

DESCRIPTION:

The SF works with a CT in an adopter site to develop it as a demonstration site. Activities include helping develop procedures for visitors, gaining support from administrators, and making arrangements with visitors.

APPLICATION CONSIDERATIONS:

- Especially applicable for projects that draw CTs from adopters and where observing the project is an important step toward adoption.
- SF should notify D/D and neighboring SFs of emerging demonstration site.
- Because it is often difficult to gain district support to become a demonstration site, SF can play a critical role.

RESOURCES:

Indiana SF
Minnesota SF

COMPONENT: SUPPORTING

STRATEGY:

SF is a primary source of support for all CTs in state.

DESCRIPTION:

SFs take on a variety of support responsibilities for CTs in their state. These include:

- maintaining regular contact via phone to lend support and assistance.
- holding meetings of CTs to discuss problems and renew information (especially re: NDN)
- issuing a periodic simple newsletter containing information on state developments, the NDN, recent adoptions.

APPLICATION CONSIDERATIONS:

- SF support activities should "supplement not supplant" those of the D/D.
- D/D and SF should discuss what each other can/should/will do.
- The CTs in a state can be a good resource to SFs -- spokespeople for the NDN, referral sources to other adopters, help with awareness, contact person in adopting districts.

RESOURCES:

Massachusetts Facilitator Project

COMPONENT: SUPPORTING

STRATEGY:

SF arranges meetings of adopters that CT attends.

DESCRIPTION:

The SF arranges a meeting of adopters of a particular project that has had several adoptions and invites the CT to attend. The meeting provides an opportunity for adopters to discuss implementation problems, share successful strategies and ask questions about program procedures.

APPLICATION CONSIDERATIONS:

- Often used by SFs who are the certified trainer themselves.
- Especially useful when CT is an adopter working in a nearby site.
- Helps SF keep on top of needs for follow-up assistance to adopters.
- D/Ds that have limited staff resources can give responsibility for follow-up to CT and SF.

RESOURCES:

NDN TAB

COMPONENT: SUPPORTING

STRATEGY:

Reinforcement

DESCRIPTION:

D/Ds provide various forms of positive reinforcement to CTs, including:

- presenting them with certificates indicating their successful completion of CT training.
- sending letters to their districts or agencies acknowledging their role and contribution.
- sending them thank-you letters after they complete training, submit reports, etc.
- sharing adopter and SF feedback with them.

APPLICATION CONSIDERATIONS:

- These activities help reduce feelings of isolation and distance from project.
- CTs from adopter sites greatly appreciate kudos to their supervisors.
- Important means of maintaining support for CT's activities within their district
- Can be done easily, quickly, informally.

RESOURCES:

ALPHAPHONICS

COORDINATING

COMPONENT: COORDINATING

STRATEGY:

D/D schedules all CT activities.

DESCRIPTION:

In this strategy, D/Ds are the initiators of all CT activities, from initial contact with an adopter through training and follow up. The D/D schedules each CT for awareness, training and follow up activities, and coordinates CT activities with SFs in their states. Reimbursements for fee and expenses go to D/D who then pays CT.

APPLICATION CONSIDERATIONS:

- Affords D/D greatest control over adoption activities.
- Can discourage SF from initiating activities.
- Requires extensive staff time when demands are high.
- Fosters high degree of continuity throughout adoption process (D/D serves as both linker and service provider).
- Good coordination needed between D/D and SFs to take advantage of opportunities such as awareness conferences.

RESOURCES:

Early Prevention of School Failure
Elsmere
RER
VRP
IRIT

COMPONENT: COORDINATING

STRATEGY:

CT schedules own activities with adopters.

DESCRIPTION:

CT draws up a tentative schedule of activities for an adopter site and submits the schedule to the D/D for approval before activities begin. Either the D/D or CT coordinates the final schedule with the SF.

APPLICATION CONSIDERATIONS:

- Expands CT relationship with adopter.
- Diverts CT time from actual delivery to administrative activity.
- Reduces the number of people involved in communicating about scheduling.
- May need to attend to SF concerns about being involved if SF covering costs.
- Works best when CT is involved extensively with several adopters and can devote necessary time to administration/coordination.
- Effective when CT is part of SF staff.
- CT needs to be clear about procedures and protocol.

RESOURCES:

East St. Louis Follow Through

COMPONENT: COORDINATING

STRATEGY:

D/D and CT share scheduling responsibility.

DESCRIPTION:

In this strategy both the D/D and CT are possible contact points for adopters, and whoever is contacted enables the initial schedule for CT activities. When possible, D/Ds assign adopters to CTs -- primarily geographically; otherwise, CTs clear adopter requests for training with the D/D before proceeding to schedule specific activities.

In both cases, all arrangements are coordinated with SFs.

APPLICATION CONSIDERATIONS:

- Flexible and capable of accommodating varying adopter conditions.
- Requires close communication among all parties.
- If CT has negotiating/scheduling responsibility, needs to be clear about procedures and protocol.
- Close coordination with SF essential if SF doing follow-up.

RESOURCES:

Instruct
Perception +

COMPONENT: COORDINATING

STRATEGY:

CT, SF and adopter schedule activities.

DESCRIPTION:

Projects that use this strategy rely on all activities for a given adopter to be scheduled jointly by the SF, CT and adopter site. The resulting schedule is negotiated with the D/D. Any party can initiate; information flow to D/D is the responsibility of the CT.

APPLICATION CONSIDERATIONS:

- Accommodates the parties conducting and receiving activities.
- Involves SF early in process -- important for in-state coordination and continuity from awareness through follow-up.
- Assumes CT fully authorized to act on behalf of D/D.
- Especially good if SF conducting awareness and/or follow-up.

RESOURCES:

PEGASUS-PACE
NAIL

COMPONENT: COORDINATING

STRATEGY:

CTs submit reports on all activities to D/Ds.

DESCRIPTION:

CTs are responsible for submitting reports on all their activities with adopters. In some cases (VRP), D/Ds also require an annual report from all CTs.

APPLICATION CONSIDERATIONS:

- Supplements other coordinating strategies with written record.
- Helpful in synthesizing information about D/D activity.
- Contributes to quality control and management of CT activity.
- Variation: CT responsible for submitting implementation and impact data to D/D.
- CTs should be given specific guidelines or forms for preparing reports.
- Involve SFs in designing report outlines so their information needs are considered.
- This strategy should be related to evaluation of CT system.

RESOURCES:

East St. Louis Follow Through
PEGASUS-PACE
NAIL
VRP

COMPONENT: COORDINATING

STRATEGY:

SF matches characteristics of adopter with CT.

DESCRIPTION:

In several cases, the characteristics of the adopting district should be considered in determining who should train them. An obvious example is that (where possible) CTs with experience at the secondary level should train secondary school sites. Other factors to consider are: public school/private school, rural/urban, high SES/low SES, etc.

APPLICATION CONSIDERATIONS:

- Suggests major determination of who provides services is in the hands of SF.

RESOURCES:

Massachusetts Facilitator Project

COMPONENT: COORDINATING

STRATEGY:

SF handles all arrangements with certified trainer.

DESCRIPTION:

When the SF has identified a potential adopter, the SF contacts the certified trainer to arrange the training session. The SF informs the D/D of these arrangements, negotiates fees and expenses with the adopter and the certified trainers, and arranges any necessary follow-up assistance with the adopter and certified trainer.

APPLICATION CONSIDERATIONS:

- Some D/Ds want all referrals to certified trainers to go through them.
- Important that SFs have up-to-date lists of certified trainers.
- D/Ds should make procedures for using certified trainers and documentation requirements clear to SFs.
- This strategy works well for projects that have limited staff and clerical time for making arrangements.
- Having all SFs take major responsibility for making arrangements may lead to great variation in procedures, fees, frequency of use, etc.

RESOURCES:

Missouri SF
Nebraska SF
Delaware SF
South Carolina SF
Virgin Islands SF
Connecticut SF

certified training strategy

COMPONENT: COORDINATING

STRATEGY:

CT training arranged in conjunction with D/D presence in the area.

DESCRIPTION:

The D/D identifies potential CTs in areas where he or she is traveling to do awareness, training, or follow-up. If there are good potential CTs, the D/D arranges to remain in the area to conduct CT training.

APPLICATION CONSIDERATIONS:

- Takes advantage of limited travel resources.
- Especially good where D/D wants to beef up number of CTs in a region (i.e., where demand for adoptions is high and distance from D/D site prohibitive.

RESOURCES:

Pre-Algebra

NDN TAB

COMPONENT: COORDINATING

STRATEGY:

Document routing.

DESCRIPTION:

The D/D supplies the CT with forms for documenting phone contacts, agreements, schedules, evaluation results, and expenses. These are routinely sent to D/D, SF, and adopter, as appropriate.

APPLICATION CONSIDERATIONS:

- Part of overall project documentation system.
- D/D needs organized procedure for compiling, storing, and tracking information received.
- Cuts administrative time for all parties.

RESOURCES:

Active
ECRI
VRP

COMPONENT: COORDINATING

STRATEGY:

SF coordinates training of several sites at once.

DESCRIPTION:

The SF tries to get multiple sites to sign up for training at the same time or back-to-back.

APPLICATION CONSIDERATIONS:

- Especially good for remote areas where travel is prohibitive.
- Variation: CT coming into state to train one site does awareness or follow-up with others.
- Many adopters like to have staff trained with others.
- Works well when there is a demonstration site in the state that can accommodate more than one adopter at a time.

RESOURCES:

Alaska SF
Maine SF
New Hampshire SF
Virgin Islands SF

COMPONENT: COORDINATING

STRATEGY:

Payment of CT's fee contingent upon submission of adopter evaluation data.

DESCRIPTION:

The D/D withholds payment of the CT's fee until the pre-test data from the adopter site and training evaluation results are received.

APPLICATION CONSIDERATIONS:

- Getting data submitted is a major problem for many D/Ds. This strategy places responsibility for following up with adopter with the CT.
- Some CTs will insist on payment shortly after training -- legitimate time lag in collecting data may be a problem.

RESOURCES:

Catch Up

RECERTIFYING

COMPONENT: RECERTIFYING

STRATEGY:

Formal annual or bi-annual recertification.

DESCRIPTION:

This strategy is a structured, formalized, regular event to which all CTs for a given project are subject. Conducted during an annual CT conference or during annual or bi-annual recertification site visits, this strategy includes:

- observation of CT performance,
- review of evaluation data submitted to the D/D by adopters with whom the CT has worked, and in some cases,
- a requirement that CTs continue to be operating a quality adoption in their home district (this applies to CTs drawn from adopter sites only; i.e., IRIT and NAIL).

APPLICATION CONSIDERATIONS:

- Brings in-depth attention to CT performance.
- Provides means for addressing weak areas, individual CTs.
- Requires extensive planning and arrangements.
- Hard to do if D/D project has a one or two person staff.
- Standards of performance need to be carefully specified.
- Should relate to evaluation strategies for CT system.

RESOURCES:

Early Prevention of School Failure
PEGASUS-PACE
NAIL
IRIT

COMPONENT: RECERTIFYING

STRATEGY:

Informal, continuous recertification.

DESCRIPTION:

Recertification is an ongoing, informal process that assesses CTs' competency through various forms of evaluation, including:

- observation by the D/D
- feedback from adopters
- outcomes of CT work such as
  - -- number of adoptions that result from awareness conferences,
  - -- quality of implementation that results from CT training, and
  - -- client satisfaction with follow up assistance provided by CT (INSTRUCT).

APPLICATION CONSIDERATIONS:

- Permits continuous feedback and upgrading of CTs.
- Requires consistent attention of D/D to conduct observation and administer other data collection activities.
- If process leads to revoking certification, standards and criteria should be clear.
- Climate of openness and growth difficult to foster if CT feels certification is always in jeopardy; helps if certification granted for specific period and this strategy used to assess rather than render continuous judgment.

RESOURCES:

Instruct
Focus

COMPONENT: RECERTIFYING

STRATEGY:

Recertification of inactive CTs.

DESCRIPTION:

For some projects, recertification is required only of inactive CTs who want to become active trainers again. In this case, the CT must meet the D/D's original certification requirements; e.g., be observed and participate in refresher training.

APPLICATION CONSIDERATIONS:

- Straightforward and simple approach that still permits quality control.
- Assumes active CTs are certified "for life" as long as they remain active.
- Works well for projects that have refresher training as ongoing part of CT system.

RESOURCES:

Perception +

COMPONENT: RECERTIFYING

STRATEGY:

Survey CTs every two years.

DESCRIPTION:

The D/D project prepares a questionnaire that is mailed to CTs every year. Its purpose is to update information about the CT and to determine continued interest. The results are used along with a review of their work to determine continued certification.

APPLICATION CONSIDERATIONS:

- Provides up-to-date list.
- Results should be shared with SFs and TAB.
- Provides basis for review of problems by telephone.
- CT comments helpful in evaluating CT system.

RESOURCES:

IPLE

EVALUATING

COMPONENT: EVALUATING

STRATEGY:

Adopters evaluate CT performance.

DESCRIPTION:

Through workshop evaluations, written questionnaires and feedback forms, (usually those used to evaluate D/D staff as well), D/D collects feedback from trainees on CT performance.

APPLICATION CONSIDERATIONS:

- Results in direct feedback on all trainers in consistent fashion.
- "Post-workshop reactions" tend to be more positive and less specific than later assessments of outcomes -- they tap satisfaction primarily; combined with other sources of data collected after implementation started, can be very helpful.
- Relates to (and influenced by) evaluation of training design and content.
- Should be part of overall evaluation of CT system.

RESOURCES:

PEECH
Pre-Algebra
CHILD
NAIL
Rutland Center
CSE Guidebook for Evaluating Dissemination Activities

COMPONENT: EVALUATING

STRATEGY:

D/D collects impact evaluation data on CT sites.

DESCRIPTION:

Projects using this strategy collect data on student performance and teacher performance (using pre-post test measures) for sites where CTs have acted as trainers and follow-up assisters. Evaluation measures used for CT sites are the same as those used in sites where D/D staff do training and follow up.

The D/D administers the evaluation during monitoring visits to the adopter site. Results are compared with those obtained for D/D staff at their adoption sites.

APPLICATION CONSIDERATIONS:

- Bases evaluation on results -- eliminates assumption that trainee satisfaction or positive observation results lead to desired outcomes.
- Performance outcomes may be measurable only after implementation has been underway several months or longer; therefore more immediate feedback must be obtained through other means.
- Difficult to isolate many variables that contribute to impact -- quality of CT performance only one.
- Variation: a project monitor is appointed at the project site to collect data.
- Should be part of overall impact evaluation and CT system evaluation.

RESOURCES:

East St. Louis Follow Through
ECOS
CSE Guidebook for Evaluating Dissemination Activities

COMPONENT: EVALUATING

STRATEGY:

D/D collects implementation evaluation data on CT sites.

DESCRIPTION:

Projects that use this strategy are interested in assesssing the fidelity of a CT's approach to the D/D's approach, and the quality of the program's adoption at the adopter site. Typical measures used include:

- detailed workshop records and/or D/D observation of a CT in action, to assess a CT's fidelity to training objectives and activities, and
- pre-post tests and key element checklists to assess implementation of the program by adopting teachers.

In addition, these projects collect more informal feedback from adopters on the over-all quality of assistance (particularly in follow-up activities) provided by CTs.

APPLICATION CONSIDERATIONS:

- Can be tied in to management and impact evaluation.
- Connects performance of CT to implementation and impact outcomes.
- Especially applicable to projects that are very complex and where CT is involved in all phases of the adoption.

RESOURCES:

Instruct
Learncycle
ECOS
CSE Guidebook for Evaluating Dissemination Activities

COMPONENT: EVALUATING

STRATEGY:

SF assumes responsibility for evaluating awareness and training.

DESCRIPTION:

Many SFs attend awareness and training activities in their state and have an obvious stake in their quality. Using procedures agreed upon between the SF and D/D, the SF can formally evaluate the quality of the CT's presentations.

APPLICATION CONSIDERATIONS:

- When more than one CT for a given project is doing awareness and training in the state, the SF can make comparisons.
- Variation: the SF observes each CT only once (or once per year) to assure quality.

RESOURCES:

COMPONENT: EVALUATING

STRATEGY:

SF determines fidelity of adoption following training by CT.

DESCRIPTION:

When the D/D project has identified its key elements and specific indicators for them, the SF can use this as a checklist of adoption fidelity.

APPLICATION CONSIDERATIONS:

- Especially applicable as a means of evaluating results of CT training.
- Helpful in determining sites to be used as demonstration sites.
- Some projects have fidelity as a criteria for certifying trainers. SF can help determine this.

RESOURCES:

Iowa SF
CSE Guidebook for Evaluating Dissemination Activities
Key Element Checklist
Susan Loucks --The NETWORK, Inc.

COMPONENT: EVALUATING

STRATEGY:

SF observes CT conduct training and gives feedback to D/D.

DESCRIPTION:

A D/D who does not have the opportunity to observe the CT requests that the SF observe. The SF completes an observation evaluation and talks with the D/D about any problems.

APPLICATION CONSIDERATIONS:

- Observation is an important evaluation method, particularly if the training of the CT did not include observation.
- SFs often attend training sessions anyway so request is not a major imposition.
- CT should know about and agree to the observation.
- If possible, have SF share feedback with CT.

RESOURCES:

COMPONENT: EVALUATING

STRATEGY:

Use of the CSE Guidebook for Evaluating Dissemination Activities.

DESCRIPTION:

The CSE Guidebook, in addition to providing extensive information on evaluation in general, contains booklets dealing with the evaluation process. One of these booklets addresses certified trainer operations and includes material to help D/Ds.

- Assess the Effects of CT Operations
- Formulate and/or Review a Management Plan for CT Operation
- Select Certified Trainers
- Determine CT Needs
- Develop or Assemble Supports and Resource Material for CTs
- Arrange Sessions for CTs
- Assess the Effects of Training Sessions for CTs.

APPLICATION CONSIDERATIONS:

- A D/D can go through the entire process or parts of it to evaluate their CT operation.
- The "content bank" in the booklet suggests evaluation techniques that can be used in each area.

RESOURCES:

Adrianne Bank and Nancy Snidman, CSE
TAB CSU and RSUs

From the NDN Director:

The NDN has responded successfully to several challenges throughout its history. Some of these were the result of changing priorities in education funding; others were caused by changes within the Network itself. Our success over the years is attributable to our ability to anticipate new conditions while holding steadfastly to our goals.

As we go forward in the face of today's challenges, we must do everything we can to assure that our resources are cost effective and available to educators everywhere. This Guidebook represents our increasing attention to the use of certified trainers and to the management methods employed to coordinate their participation. It is my belief that expanded and improved certified trainer operations hold great hope for the future viability of the NDN.

Lee E. Wickline, Director
National Diffusion Network

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TABLE OF CONTENTS

FOREWORD i

INTRODUCTION iv

Section 1: OVERVIEW 1-1

Section 2: PROJECT ASSESSMENT 2-1

Section 3: SYSTEM DESIGN 3-1

Section 4: STRATEGIES 4-1

Section 5: ISSUES 5-1

Section 6: APPENDIX:

- Certified Trainer Operations: Criteria and Procedures Used by Developer/Demonstrators
- Criteria for Identifying Certified Trainers
- Certified Trainers: Problems, Issues and Learnings
- Selected References on Dissemination.

FOREWORD

As we enter 1982, public support for education is at a low ebb. Federal policymakers are struggling to reformulate their leadership role, to restructure and consolidate programs, and to allocate sparse resources to efforts that have demonstrated success in cost effectively improving education.

The National Diffusion Network stands out among dozens of federally supported programs as a system that has succeeded. Its record reflects today's priorities -- applying locally-developed, practical, proven, and economical solutions to real educational problems. To achieve this status, the NDN has undergone significant evolution over its seven year history. Reflecting on that history puts in context the developmental changes that are taking place now.

The roots of the NDN lie in Title III of the Elementary and Secondary Education Act of 1965, landmark education legislation. Section 306 of Title III authorized the Commissioner of Education to fund exemplary innovative programs developed in local education agencies.

Current NDN Division Director Lee Wickline directed the 306 program during its initial years. In 1973, with the demise of the 306 program imminent, Wickline and his associates convened a Task Force of local and state agency people who had been involved in the 306 program to design the final phase. The Task Force quickly concluded that, rather than using the remaining year of 306 funds to create additional projects, the money should be used to disseminate the successful Title III projects. The Dissemination Review Panel (called the Joint Dissemination Review Panel since 1974) provided the quality control in identifying programs whose effectiveness could be validated.

And so, the National Diffusion Network was conceived and initially designed by educational practitioners collaborating with federal policy makers. This tradition of partnership has been reflected throughout the NDN's history, causing it to be frequently referred to as a "field-generated" system.

The founding purpose of the NDN remains primary today. "The NDN was established in 1974 to promote -- at a fraction of their original development costs -- the widespread national use of exemplary educational programs." (Federal Register, vol. 45, no. 78). Within today's context of extraordinary cuts in education funding at the federal level, the NDN's success in carrying out its mission has helped it to emerge as a cost effective program with broad grass roots support. But the basis of the NDN's survival, as well as its hope for the future, is due in large measure to its fundamental achievements:

- The exemplary programs that have become D/Ds have succeeded in creating significant numbers of adoptions.
- The adoption sites represent faithful replications of the exemplary programs and have themselves become beacons of school improvement.

These achievements reflect NDN members' success in expanding their dissemination capability beyond project staff. As with many aspects of their work, D/Ds and SFs have developed sophisticated methods for doing this. Indeed, within the context of the NDN, the approaches to using certified trainers can be thought of as a set of "exemplary practices" that warrant further adoption. Supporting this priority is the report of a House Appropriations Committee that conducted a six-month investigation of the NDN in 1981. While strongly applauding the NDN record overall, the Committee stated their conclusion that NDN projects were not using enough certified trainers. (NDN Reporter No. 14, Summer 1981).

The NDN Division is actively committed to expanding the use and increasing the effectiveness of certified trainers. Consolidating the wisdom and resources from within the Network and using them to assist D/Ds and SFs improve their use of certified trainers holds promise for furthering the goals of the NDN.

But, perhaps as important, carrying forward the pioneering efforts of NDN members in this area as well as in others will expand the Network's success in improving schools through the adoption of exemplary programs. The NDN is increasingly viewed as a system that can respond to impending challenges no matter what organizational forms emerge at the local, state, and federal level. Continuing the strong partnership that has been the foundation of the NDN's development will enable it to realize this promise.

INTRODUCTION

The goals of the NDN and the demand for its programs have fostered the need for Developer/Demonstrator projects to extend their dissemination capability through the use of certified trainers. The idea is a simple one. Find people who can be trained to work with adopters and give them their assignments. In practice, however, the great diversity within the NDN has resulted in a wide variety of approaches to using certified trainers. The variations reflect not only the extensive differences among the projects and within the educational system itself, but the individual differences of the D/D personnel.

Much has been learned. As in many other areas, NDN members have invented methods for accomplishing their goals and refined these methods over time through practice. A wealth of materials, strategies, and insights have been developed and to a degree these have been shared within the Network.

Over the past year, interest in the use of certified trainers has heightened, sparked by decreasing project resources for dissemination and an increasing NDN-D priority on expanding project capability. In this area as in others, TAB's assistance role focuses on consolidating the knowledge and resources within the field and facilitating sharing among NDN members.

This Guidebook is part of that effort. It was developed with the assistance and participation of numerous NDN members who shared their knowledge, resources, and ideas. This input from the field was obtained in several ways.

First, an advisory group of NDN members was formed in early 1981 to begin to define the needs and resources in the field. This group reviewed plans and continued to contribute ideas throughout the year. Over the winter and spring of 1981, all NDN members were surveyed to identify strategies, resources, and issues. Materials from several projects were reviewed. A workshop session in Region III offered an opportunity to pilot some of the materials. And an animated discussion took place during a session at the 1981 NDN Conference. To each NDN member who contributed, we express our appreciation. The members of the advisory group deserve special thanks. Not only have they greatly contributed to the development of the manual, but they will be available to NDN members wanting individualized assistance in the area of certified training. They are:

Jolene Schultz
Missouri State Facilitator
Center

Don May
FOCUS Dissemination Project

Tom Vodola
Project ACTIVE

Ron Cartwright
NDN-D

Torrey Piazza Templeton
The Teaching Research
Infant and Child Center

Fay Harbison
Project CATCH-UP

Mary Alice Felleisen
Project COPE

Ellen Meier
TAB Central Service
Unit

How the Guidebook Is Organized

In developing the Guidebook, we struggled with how to best present the material so that it would be maximally useful to several audiences: D/Ds using certified trainers but wanting to improve their efforts by learning about what others are doing, D/Ds not using certified trainers who want to begin doing so, SFs who work with certified trainers, NDN-D staff wanting to learn more about the approaches and implications in use; and others interested in dissemination.

Initial consideration was given to organizing the Guidebook around descriptions of "models-in-use" -- prototypes from which readers could extract information. We found that this approach had its problems. First, there are so many distinct "models" in the NDN that selecting representative prototypes would be very difficult. Second, among the approaches in use there are subtle but significant variations in many aspects. We concluded that describing a set of approaches would be too limiting and would make finding the most useful information difficult. (Although an Overview of Current Practice is included in Section 1 to paint the broad picture.)

The solution we chose was to organize information according to a set of generic components -- key elements -- common to most certified trainer systems. The components are: Identifying, Training, Certifying, Funding, Supporting, Coordinating, Recertifying, and Evaluating. Within each component, we have collected strategies in use within the NDN and presented those in a standard format.

We discovered along the way that there are many things to consider in selecting a particular strategy or developing a particular type of certified trainer operation. For projects interested in designing a system for the first time, understanding those considerations seemed important. For projects with certified trainer systems that have evolved over time, analyzing their operation in light of these factors could help refine aspects of it. Therefore, the Guidebook also contains project assessment tools and procedures for designing or refining certified training systems in a workbook format.

Finally, there are numerous issues surrounding the topic of certified training in the NDN. These have been the subject of dialogue (and at times heated debate) within the Network. We have attempted to formulate several of these issues in the interest of fostering resolution.

What is not here is a set of policy statements from NDN-D regarding certified trainers. Great consideration has been given to doing this, but each time possible policy statements were drafted, they unintentionally excluded a practice that for at least some projects was a reasonable one. The current position is one of continuing dialogue and working toward refinements in practice based on expanded information. This position reflects NDN-D Director Lee Wickline's posture of supporting field-generated practice until clear cut directions emerge so that projects are not inappropriately restricted.

It is hoped that these resources will contribute to the purpose even a "good" policy statement would serve: to expand the use and increase the effectiveness of certified trainer systems in the NDN. That effort will require the ongoing attention of all NDN members; in this sense the Guidebook is intended to provoke dialogue and stimulate further work in this important area.

Continued work on this topic will be initiated and supported by the Technical Assistance Base through the Central Services Unit and the Regional Service Units. Those seeking information on resources and services available through TAB may contact any TAB representative.

Central Service Unit
Mary Ann Lachat, TAB Project Director
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Section 1: OVERVIEW

Audiences, Purposes, and Contents

This Guidebook is directed at four major audiences, all of whom will use it in different ways.

- For the D/D project with a certified trainer system, the Project Assessment section might pinpoint components that need to be changed, and the Strategies section used to identify alternative procedures.
- For the D/D project without a CT system, the Guidebook as a whole -- particularly the section on System Design -- can be used as a step-by-step guide to designing and planning one.
- State Facilitators who work with CTs might broaden their awareness of possible strategies and their implications, and might find the section on Issues helpful in focusing problems.
- Finally, NDN-D staff and others interested in dissemination can use the Guidebook to expand their understanding of current practice and issues in the NDN regarding certified trainers.

A further purpose to be achieved by the Guidebook is to focus dialogue within the NDN on a topic that is essential to the future strength of the NDN.

NDN members are familiar with the Guidebook for Evaluating Dissemination Activities: Resources for NDN Practitioners produced by the Center for the Study of Evaluation. The CSE Guidebook contains a module on Certified Trainer Operations that helps projects identify evaluation questions and techniques. This Guidebook, while compatible with the CSE Guidebook, assumes the perspective of system development and refinement, and regards evaluation as one component, or key element, of a CT system.

The *Guidebook* consists of six sections:

Section 1: OVERVIEW
Section 2: PROJECT ASSESSMENT
Section 3: SYSTEM DESIGN
Section 4: STRATEGIES
Section 5: ISSUES
Section 6: APPENDIX

What is a Certified Trainer?

A Certified Trainer (CT) is someone who has been selected and prepared by a D/D to help disseminate the project. Though the term suggests that the CT's primary function is *training*, many CTs serve other functions as well -- awareness, follow-up, and evaluation.

What is a Certified Trainer System?

A system is merely a structure for organizing numerous interdependent activities in an orderly fashion. The notion that a project's certified trainer operation is, or should be, systematic is based on the assumption that these activities relate to one another. For example, the level of *training* a certified trainer receives has implications for the *functions* that trainer can perform.

We've identified a set of key elements, or components, of a Certified Trainer System. They are:

IDENTIFYING:	The type of people identified and where they are found.
TRAINING:	The procedure through which certified trainers are prepared by the D/D.
CERTIFYING:	The procedure and criteria by which someone is designated an "official" certified trainer.
FUNDING:	How activities of certified trainers are paid for and by whom.
SUPPORTING:	The kinds of assistance given to certified trainers (other than financial).
COORDINATING:	How a project's certified trainer actitivies are organized and managed.
RECERTIFYING:	How certification is reconsidered and renewed.
EVALUATING:	How the activities of certified trainers are assessed (process and process).

These components are generic in that they are categories of activities that can be applied to all certified trainer operations.

Some D/D projects don't have all of the components listed above; for example, some don't have identifiable procedures for recertifying, or supporting, CTs. In some projects, the procedure used in a particular component may be very informal -- such as providing support by inviting CTs to call in if they need help. This Guidebook can be used to assess the project and its CT operations to determine if more formal or extensive procedures should be considered.

A Certified Trainer System, then, is a set of procedures in each of the component areas that is based on the nature of the project and its dissemination goals and activities.

What is Current Practice Within the NDN Regarding Certified Trainers?

Certified trainers have been used in the NDN since its first year, and are widely used today. NDN members site several reasons for using certified trainers. The obvious reason, and typically the reason a project begins using CTs, is that the number of requests for adoptions outstrips the project staff's ability to respond. Certified trainers serve to extend the project's dissemination capability.

But there are other benefits cited by D/Ds for using auxilliary project representatives. A certified trainer, even one requiring a stipend, is less expensive than a salaried staff member. Certified trainers located nearer the potential adopter also mean lower travel costs, increasingly a major consideration. Further, having a cadre of project representatives in several states builds awareness of and good public relations for the project in those states and locales.

Finally, as D/D project staffing is reduced by budget cuts, certified trainer systems offer a means of dividing the labor. Extensive use of certified trainers permits the project staff to concentrate on managing the many tasks associated with dissemination: coordination, communication, materials development, and evaluation. Certified trainers in the NDN perform the functions of awareness, training, evaluation, and follow-up. Some projects use certified trainers for one or two of these functions and perform the other functions themselves. These decisions seem to be based on several reasons. For example, a complex project for which observing the program in operation is important may use certified trainers for awareness and follow-up, with adopter training taking place at the project site. A less complex project that is highly "packaged" may successfully use certified trainers for all four functions.

Table 1 shows the current level of use of certified trainers within the NDN in each of these functions.

Table 1

USE OF CERTIFIED TRAINERS BY FUNCTION
(Total = 89 projects)

Awareness	Training	Evaluation	Follow-up	All Four
64	62	45	59	45

(Source; Far West Laboratory: NDN Developer/-Demonstrator Directory, Third Edition, Summer 1981)

Beyond the variation in how CTs are used, there is tremendous variation in many other aspects: where CTs are located; how many a project uses; how formal or informal the procedures are; the project's policies governing CT operations; and the relationship among D/D, CT, and State Facilitator (SF).

Related to the use of certified trainers is the use of various types of dissemination sites: adoption sites, demonstration sites, and turnkey sites. These are defined as follows:

Adoption Site: An educational setting where the D/D project has been replicated.

Demonstration Site: The original D/D site or an adoption site where the project can be observed.

Turnkey Site: A site where new adopters can be trained by Certified Trainers. (NOTE: Turnkey sites are often referred to as "satellite sites" since virtually all D/D functions can be carried out at them.)

Table 2 shows the number of D/Ds with each type of site.

Table 2

D/D DISSEMINATION SITES
(Total = 89 projects)

Adoption	Demonstration	Turnkey	All Three
84	71	52	49

(Source: Far West Laboratory: NDN Developer/-Demonstrator Directory, Third Edition, Summer 1981)

The strategy descriptions in Section 4 of this Guidebook show the range of current practice within each component area. General descriptions of certified trainer operations for most D/D projects are included in the Appendix.

Section 2, which follows, presents a process for assessing a D/D project in order to specify the kind of certified trainer system that would best serve it.

Section 2: PROJECT ASSESSMENT

Many D/D projects developed their certified trainer operation as needs and conditions dictated. Lacking clear models and guidelines, procedures were developed ad hoc without full consideration of long term needs and implications.

Refining a certified trainer system currently in operation or designing a new system requires looking at aspects of your project that should influence the type of system and the particular strategies you use. This section will show you how to do that assessment and then take you through an assessment of your own project. (Note: involving the whole project staff -- including certified trainers -- might be a good opportunity for all of you to reflect on your dissemination activities.)

If you already use certified trainers, the "Status Check" activity will allow you to look at what you are doing. (Skip this activity if you don't use certified trainers.)

Some suggestions for using the Status Check Activity:

- Have other project staff complete the status check independently. Discuss results to assure a common agreement about your procedures.
- If there are components for which you do not have clearly identifiable procedures, try to list possible benefits of having them. Indicate results in the "Problems" column.
- Use the booklet on Certified Trainer Operations from the CSE Guidebook for Evaluating Dissemination Activities to determine how you can verify your assessment.

Certified Trainer System
STATUS CHECK

This activity is designed to help you look at your current certified trainer operation to determine where there might be gaps. Another outcome of this activity will be to articulate your current operation for other interested parties: certified trainers, State Facilitators, other project staff.

WHAT ARE WE DOING NOW?

	Strategy/Procedures	Person(s) Responsible	Documentation/Records	Issues and Problems
Identifying				
Training				
Certifying				
Funding				
Supporting				
Coordinating				
Recertifying				
Evaluating				

As we've said, the type of certified trainer system you have depends on the type of project you have. The next activity uses decriptions of two hypothetical projects to help you think about how a project's characteristics affect its certified trainer operation.

Assessing A Hypothetical Project

In this activity, you are given information about two hypothetical D/D projects that want to consider developing a certified trainer system. Thinking about these hypothetical situations will help you understand how to assess your project.

> INSTRUCTIONS: Read the description of Project MELD. As you do, think about the characteristics of the project that should affect its certified trainer system.
>
> If you find that you need further information, make up the answers you need to conduct the assessment. Use the worksheet to record your thoughts.

Project MELD

Project MELD is a special education project using precision teaching and classroom management techniques to improve the skills of moderately and severely handicapped children in self-contained classrooms. The project was originally developed in 1975 under federal special education funding and was approved by the JDRP in 1979.

The project has received a great deal of attention in the rural northern midwest state where it was developed and has been disseminated extensively within the state. The state education agency, in fact, contributed to the development and refinement of curriculum materials and diagnostic probes that are now sequenced and packaged for dissemination. The state facilitator project is housed at the state education agency.

Since receiving D/D funding in 1980, the project has operated out of a separate office in the district administration building. It is staffed by a project director -- one of the original developers -- and an administrative assistant. All training has been done by project teachers from the district, where the program is used exclusively to serve moderately and severely handicapped children K-12. Some mainstream special education teachers and regular education teachers have been trained in the district and are using the techniques successfully in their classrooms with both handicapped and non-handicapped children. New skills sequences and diagnostic probes have recently been developed to accommodate non-handicapped populations.

The training program for the project consists of two days of demonstration, practice, and content input on precision teaching concepts, special education systems, adaptations, orientation to materials, etc. The D/D staff provides telephone follow-up and semi-annual refresher training.

The state has been nearly saturated with the project but because the precision teaching approach is gaining acceptance nationally, the project is getting more requests to train in other states. The budget is small, but currently adequate, since training in-state has been partially supported by the SEA through direct payment and in-kind services.

Project staff view the demand for broader dissemination with mixed feelings. Some are interested in doing extensive training nationally, but others want to continue in the classroom. The project director has applied for an administrative position in another district.

WORKSHEET: PROJECT MELD ASSESSMENT

1. What additional information did you need?

Question	Answer You Supplied	Why Important?

2. What pieces of information have implications for the project's certified trainer system?

3. What initial conclusions would you draw about an effective certified trainer system for this project?

The second hypothetical project is very different, as are the implications for its certified trainer system. Do the same analysis of Project HOPE, then compare your conclusions with the ones you made about Project MELD.

Project HOPE

Project HOPE was developed to provide a success-oriented learning environment for high school students from a large suburban high school in a northeastern community. The school is housed in former elementary school building. The program reflects principles of participatory democracy -- students and teachers together determine the curriculum and plan the courses. A great deal of attention is paid to the development of responsibility through meaningful experience, to the value of good citizenship, and to initiative taking. Representing a cross-section of abilities and interests, students in the program have made significant gains in achievement, self-esteem, and goal directedness.

The school's faculty includes four of the original teachers. The other four teachers have been selected by teachers and students together because of their approach to teaching, their interpersonal skills, and their content expertise. The importance of the philosophy of the program is evidenced in the weekly staff meetings where issues of approach are discussed at length.

The program was validated by the JDRP in 1977 and funded as a D/D in 1978 largely due to the efforts of the district's federal programs administrator. The staff and students have done numerous awareness activities because of NDN membership and national publicity about the school's approach and success; the D/D grant supports a secretary and one third of the school's only counselor.

Relatively few districts have requested training because of the extensive commitment of resources and change in approach necessary to implement it. There are a half dozen adoptions in place around the country and adopters meet annually with developers to share experiences and discuss methods.

The training program is not highly packaged -- material aids include course catalogues, program descriptions, evaluation reports, and sample record keeping devices. The program requires intense participation of all staff and long hours just to operate; there never seems to be enough time to conduct dissemination activities, even though staff are committed to "spreading the word."

WORKSHEET: PROJECT HOPE ASSESSMENT

1. What additional information about the project did you need?

Question	Answer You Supplied	Why Important?

2. What characteristics of the project have implications for the kind of certified trainer system the project should have?

3. What initial conclusions would you draw about an effective certified trainer system for this project?

Thinking about both hypothetical situations, what characteristics of projects have implications for their certified trainer systems? List the factors you thought of:

1.

2.

3.

4.

5.

6.

7.

8.

Before you assess your project, let's consider the characteristics you've identified and ten factors we've identified as significant. These are presented as "food for thought" as you look at your project in relation to its certified trainer system. After reviewing the following characteristics, you'll find a worksheet on which you can summarize your conclusions.

PROJECT CHARACTERISTICS THAT INFLUENCE CERTIFIED TRAINER OPERATIONS

1. How complex is the project? What is the scope of the innovation it represents?

Complexity and scope refer to the intricacy of the project and its impact on the adopting school and district. Several aspects are involved:

- The number of components, or key elements, a project has. Each key element represents a set of activities -- moving parts -- that constitute the innovation. Of course, not all key elements are equally complex in themselves, so the number alone may not convey the full picture.

- The number of people (or role groups) involved in implementing the project. A "simple" project in this regard is one that involves only classroom teachers, or only a single support services staff. A "complex" project is one that involves many groups of people, such as classroom teachers, counselors, ancillary personnel, and administrators.

- The demands placed on the implementers of the program. Low demand means that users modify what they were previously doing only moderately -- adopting a new instructional technique, using new materials, teaching a new curriculum. High demand means that those involved in implementing the program are using greatly differemt methods, performing many new tasks, assuming new roles, operating in new relationships with other staff. Another aspect of demand has to do with the philosophical or cognitive demands placed on the adopter. (Example: new math was a "simple" innovation in that it primarily affected only mathematics teachers and could be implemented in a traditional classroom setting. The demand on teachers was extremely high, however, because teachers had to adopt an entirely new way of thinking about mathematics and its instruction.)

Demand also refers to new tasks required of adopters. Classroom teachers who must participate on interdisciplinary teams, conduct assessments, individualize instruction, or incorporate volunteers in the classroom as part of an adoption are experiencing significant new demands.

- The degree of re-organization required. Do schedules have to be revised? Must physical space (in the classroom or elsewhere in the school) be modified?
- The number of grade levels involved. A program that involves many grade levels has greater impact than one limited to a few grade levels, particularly if they are all in the same building.
- The number of content areas affected. A basic skills project that affects only language arts classes is less complex than a metrics program that requires teachers in all content areas to incorporate changes.
- The importance of "invisible" factors. Are particular teacher attitudes and values central to a successful adoption? Are affective goals, such as increased self-esteem, or sense of responsibility, an integral part of the program? These areas often require subtle but significant changes on the part of the adopter.

2. How structured is the adoption process?

Are there clear, step-by-step procedures that adopters can learn relatively easily? Are the expectations able to be communicated in observable or behavioral terms? (This includes expectations and procedures for non-instructional areas, such as implementation evaluation.)

3. To what extent is the program packaged?

How extensive are the materials to support awareness, training, implementation and evaluation? Beyond the existence of clear procedures and expectations, are there materials adopters can use to get an overview of the project, to learn the techniques employed, to deal with adaptations, to conduct implementation and impact evaluation? Materials include written descriptions of the project, implementation manuals, instructional or curriculum guides, audio-visual materials, monitoring manuals, etc. They also include trainer manuals, training agendas, sample lesson plans, and checklists for arranging training.

4. What is the nature of the training program used to prepare adopters?

Aspects of this factor include:

- Length: some D/D projects can be "taught" in a one-day workshop; others require 5-10 days.

- Format: does the training require classroom observation? Practice lessons with students? Extensive application activities?

- Involvement: does the training team consist of several people with different roles in the program (teacher, counselor, administrator, volunteer)? Or, can a single individual cover all the material necessary to train adopters?

5. In what setting is the D/D project located?

Three aspects of the D/D's setting are important in designing the certified trainer system:

- The type of agency where the project is housed (LEA, private agency, university).
- The accessibility of the project -- is it in a remote area difficult to reach by public transportation? Is it near the east or west coast or more centrally located?
- Is the dissemination project housed at or near a project site?

6. What is the level of demand for the project?

The significant aspects of demand include the number of adoption requests received by the project and the geographic spread of the potential adopter sites.

7. What are the D/D project's goals for adoptions?

Some projects are able to meet the current demand for the project but want to expand to new markets, i.e., more urban areas, more out-of-state adoptions, other parts of the country, more private schools.

8. To what extent are project staff prepared to disseminate?

   - Are there enough staff to respond to demand and meet dissemination goals?

   - Do the available staff have the skills to do awareness, training, follow-up?

   - Are staff interested in and enthusiastic about taking on the responsibility for conducting all or most of the project's dissemination activity?

   - Are the appropriate project staff available to conduct dissemination activities (able to get release time, willing to travel, etc.)?

9. What is the project's rationale for using certified trainers?

   - To decrease costs by reducing travel and time of salaried staff.

   - Because demand from potential adopters or the project's dissemination goals are more extensive than staff can meet.

   - Because project staff want to concentrate on management and coordination roles.

   - Because staff believe others may be able to perform some or all dissemination functions more effectively.

10. What concerns do D/D staff have about using CTs?

Several levels of concern apply:

- Personal concerns: conflict in priorities between program implementation and dissemination; concerns about their skills.

- Fidelity concerns: uncertainty as to whether certified trainers will present the project accurately, follow the training agenda consistently, or be able to respond to adopter needs.

- Adopter concerns: resistance from adopters to being trained by someone who is not involved in implementing the project on a day-to-day basis.

- Management concerns: can the activities of certified trainers be adequately managed to assure that the project retains control of dissemination? If assignments are "given away" to outsiders will project staff have adequate financial support to remain with the project? (A part-time project staff person can be partially covered by fees charged for training.)

The previous several pages describes characteristics of D/D projects that need to be taken into consideration in designing or refining a certified trainer system. Perhaps you have added other factors from your own experience or your assessment of the two hypothetical projects.

Unfortunately, assessing your project according to these characteristics is not a simple or straightforward task. Like many organizations, D/D projects are fairly intricate operations -- their characteristics can't be precisely measured in absolute terms.

To help you with the assessment of your project, however, a Project Assessment Worksheet is provided. It addresses each of the project's salient characteristics and will help you estimate the significance of each area. The last page of the worksheet contains a graph on which you can chart your estimates.

Caution: The worksheet, particularly the summary graph, may create a false sense of precision about the assessment process. The thinking you do in reviewing each question is likely to be more valuable than the summary estimates. The graph is not intended to create an abstract analysis of your project, but to serve as a reference as you review the implications of the project characteristics for certified trainer systems.

Section 3, SYSTEM DESIGN, will help you determine the implications for your project and either design a certified trainer system or refine your existing one.

PROJECT ASSESSMENT WORKSHEET

Referring back to the project characteristics presented previously, indicate your assessment of your project relative to each characteristic. The results of your assessment can be plotted on the graph on the last pages.

CHARACTERISTICS

1. Complexity/Scope of the Innovation.

   a. How many project components, or key elements, does your project have?

   Total: 1.a. _____

   b. What role groups are involved in adopting your project? (i.e., teachers, department heads, counselors, parents. List teachers from each department involved separately.)

   ____

   ____

   ____

   ____

   ____

   ____

   ____

   Total: 1.b. _____

103

c. What are the demand on implementers? (Describe)

New instructional techniques? ____________________

New materials? ______________________________

Total new curriculum? ________________________

New tasks (assessment, ind. inst., etc? __________

____

New roles (team member, volunteer trainer)? _______

____

New relationships with other staff? ____________

____

Adoption of new philophy or beliefs? ____________

____

New cognitive framework or conceptual orientation?

____

Other: _______________________________________

(Count one point for each
applicable item) Total: 1.c.____

d. What reorganization is required by adopters
(schedules, physical space, etc.)

Describe: _____________________________________

____

____

Rating: 1 3 5 7
/_____/_____/_____/
Not substantial Very substantial

Rating: 1.d. ____

e. What grade levels are involved?

____

____

____

____

Total: 1.e. _____

f. What content areas are involved?

____

____

____

____

Total: 1.f. _____

g. What "invisible" factors are important (teacher attitudes, values orientation, affective goals)?

Describe: ______________________________

____

____

Rating: 1 3 5 7

/____/____/____/

Not significant — Substantial and essential

Rating: 1.g. _____

2. Degree of Structure in the Adoption Process.

a. How clear and well-developed are the procedures tht adopters myst learn to implement the program?

Rating: 1 3 5 7

/____/____/____/

Clearly specified — Not well specified

Rating: 2.a. _____

b. Are the expectations for the adopter articulated in observable or behavioral terms?

Rating: 1 / 3 / 5 / 7

Clearly articulated — Not at all clear

Rating: 2.b. _____

3. Extent of Program Packaging.

List: Awareness materials _____________________

____

____

Training materials _____________________

____

Implementation materials _____________________

____

Rating: 1 / 3 / 5 / 7

Extensive materials in all areas — Substantial gaps in all areas

Rating: 3. _____

4. Nature of the Training Program.

Length (number of days): _____________________

Format (workshop, observations, practice): _____

____

Involvement: (types of people from adopter site who participate): _____________________

____

Rating: 1 / 3 / 5 / 7

Day-long workshop for teachers from one content area — 1 week or longer program that includes observation and practicum involving staff from three or more role groups

Rating: 4. _____

5. D/D Project Setting.

Rating: 1 / 3 / 5 / 7

Easily accessed location where project is in operation

Remote site; limited access to demonstration site

Rating: 5. _____

6. Level of Demand.

How many request to conduct awareness, training, and follow-up (combined) have you received in the last six months?

a. Within a 500 mile radius 6.a. _____

b. Beyond a 500 mile radius 6.b. _____

7. D/D Goals for Adoptions.

a. Over the next six months we'd like to get

________ adoptions. This represents an

increase over the last six months of

_____ percent. Percent increase: 7.a. _____

b. Our priority markets are:

____

____

____

Total: 7.b. _____

8. Project Staff Readiness.

a. Are enough staff available to respond to demands and meet goals for adoptions?

Rating: 1 / 3 / 5 / 7

Adequate

Seriously understaffed

Rating: 8.a. _____

b. Do available staff have the necessary skills?

Rating: 1 3 5 7
/_____/_____/_____/
Extremely well prepared — Lack essential skills

Rating: 8.b. _____

9. Rationale for Using Certified Trainers.

Rating: 1 3 5 7
/_____/_____/_____/
Strong, clear rationale we all agree on — Not at all sure

Rating: 9. _____

10. D/D Concerns about Using Certified Trainers.

Describe: Personal Concerns: ____________________

____

Fidelity Concerns: ____________________

____

Adopter Concerns: ____________________

____

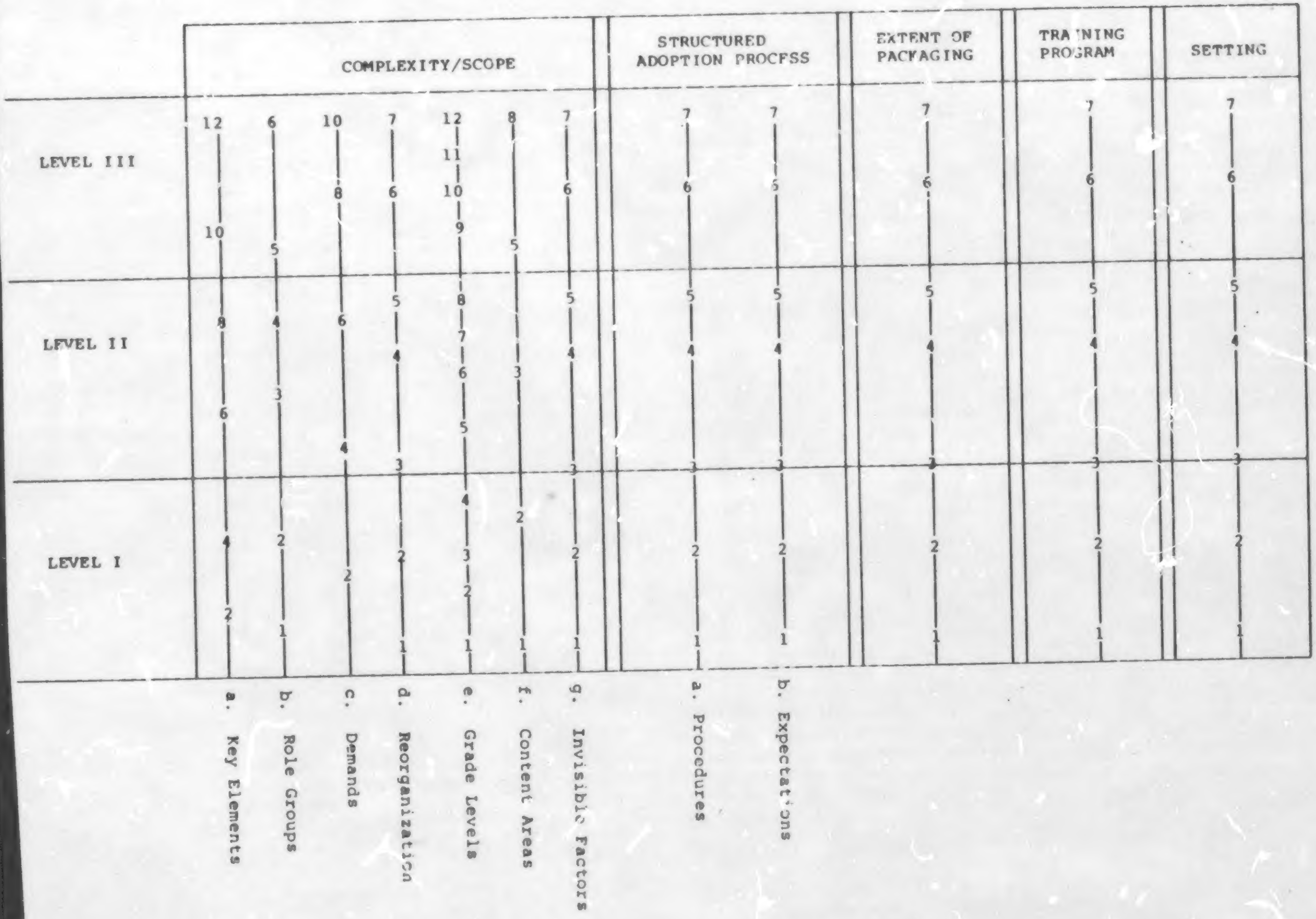
Management Concerns: ____________________

____

Rating: 1 3 5 7
/_____/_____/_____/
A few minor concerns — Numerous serious concerns

Rating: 10. _____

PROJECT ASSESSMENT SUMMARY CHART



PROJECT ASSESSMENT SUMMARY CHART (Con't.)

	DEMAND		D/D GOALS		STAFF READINESS		RATIONALE FOR CTs	D/D CONCERNS	CHARACTERISTICS IN EACH LEVEL
LEVEL III	50 30	50 30	100% 80%	5 4	7 6	7 6	7 6	7 6	
LEVEL II	20 10	20 10	50% 30%	3 2	5 4 3	5 4 3	5 4 3	5 4 3	
LEVEL I	5 1	5 1	20% 10%	1	2 1	2 1	2 1	2 1	
	a. Inside 500 mi.	b. Beyond 500 mi.	a. Percent Increase	b. New Markets	a. Availability	b. Skills			

Section 3: SYSTEM DESIGN

This section is intended to help D/Ds design a certified trainer system "from scratch" or refine existing procedures. In both cases, the results of the Project Assessment presented in Section 2 will be a primary reference. The first part of this section discusses implications for certified trainer systems according to the results of the Project Assessment. The second part of the section presents questions to be considered in designing (or refining) a certified trainer system or individual components of it.

First, let's review what a certified trainer system is. The definition of "system" included in Section 1 of this Guidebook states that a system is a structure for organizing numerous interdependent activities in an orderly fashion. A certified trainer system is a set of procedures in each of eight component areas that collectively provide a structure for using certified trainers. The selection of those procedures is based on the nature of the project and its dissemination goals and activities.

Implications of Your Project Assessment Results.

The Project Assessment Summary Chart graphically summarizes the results of your project assessment. If you connect all the plot points on the graph, a profile of ratings will emerge in Levels I, II, and III. These levels refer to the level of complexity of your certified trainer system and to the level of complexity of the design process. In this sub-section, the implications of your project assessment are suggested. As with the assessment of your project, the implications are not especially clear cut or absolute. In practice, all of the factors addressed here interact with each other. There is, therefore, no realistic way to isolate one factor and say, "If the project has this characteristic, use strategy X." The purpose of this section, rather, is to convey a sense of how project characteristics might influence the CT system and to suggest major implications for it.

1. Complexity and Scope

Level I projects: Level I in complexity and scope means you have few key elements, few role groups involved at the adopter site, modest demands of implementers, limited re-organization requirements, few grade levels and content areas affected, and few or no "invisible" factors.

On this dimension, your certified trainer system has the greatest number of options; the simpler options will work best for Level I projects. Your certified trainers might come from adopter sites, SF projects, university personnel, or private agencies. Though it is always a good idea for CTs to observe the program in action, they may not need to have implemented it. It is probably not necessary for them to be affiliated with a demonstration site. While good coordination is always important, your CTs will probably not need frequent retraining or extensive opportunities for dialogue with you about subtleties of the project. They can be geographically dispersed.

Level III on this dimension is the other end of the continuum. Highly complex projects that are broad in scope tend to require demonstration sites and practice opportunities, preferably with students. The certified trainers should be users of the program so they can communicate the subtleties of implementation to adopters. Since they should be associated with a demonstration site, they can not be as dispersed as they can be for less complex projects. They will likely need frequent contact and opportunities to review implementation problems and adaptation possibilities. Since your training program is likely to be lengthy and involved, the CTs you select must be able to be released for several days at a time with additional time available for planning. It is likely that you will need to use a training team rather than an individual trainer so that members of different role groups can be effectively addressed.

Complex projects tend to find satellite sites a viable approach to dissemination. Clear agreements and procedures with satellite site personnel need to be worked out and continually monitored.

2. Structure of the Adoption Process

The extent to which the process for adopting your project is structured most significantly affects the training of CTs. Highly structured procedures are easier to learn than fuzzy ones -- particularly if there are good materials supporting the adoption process.

Level I projects on this dimension may find that a relatively short training program for CTs is adequate, that they will not need extensive clarification and advice as they work with adopters, and that the costs of supporting adoptions (and certified trainers) are relatively small. Projects with very little structure to the adoption process -- many adaptation possibilities, procedures that are not highly detailed, and requirements that have not been fully developed in areas such as implementation evaluation -- will need to provide more support to certified trainers and greater monitoring of adoption sites to create structure as it is needed.

3. Extent of Packaging

A highly packaged program (Level I) has extensive materials for providing awareness, conducting training, implementing the project, dealing with questions, and conveying clear understandings of the project in operation (such as films or slidetapes). These projects are less dependent on the trainer to carry the full message; they tend to be more "trainer proof" than projects that are not packaged, meaning that the materials can carry much of the burden of preparing adopters.

Projects at Level III on this dimension may find that they spend a great deal of time explaining things to trainers and adopters that could be put in some non-human form. Training of CTs may be complicated by having to rely on conveying nearly every aspect of the project in person, thereby increasing the chances of miscommunication and the need for continual clarification and support.

The absence of support materials may also mean that even if the project is relatively simple in scope adopters will want to see it in operation before implementing it. This would imply that certified trainers might need to be associated with a demonstration site.

4. The Nature of the Training Program for Adopters

Level I projects in this area have relatively short training programs for adopters that do not rquire observation of the project in operation. They also do not require large teams of people from the adopter site to participate in the training. Therefore, the certified trainer does not necessarily have to go to the adopter site to do the training -- adopters from several sites can be trained together at a convenient location.

Level III projects -- ones with lengthy training programs that involve observation and practice for teams of people from the adopter site -- tend to use satellite sites that adopter teams can come to for training. They also tend to use a training team rather than an individual certified trainer to conduct the training program, thereby suggesting that extensive travel to adopter sites is prohibitive. Projects at this level should have realistic goals for the number of adoptions they can handle, since the more involved the training program is, the more involved the follow-up tends to be.

5. D/D Project Setting

If the project site is highly accessible, or if there are several sites where the project can be observed, then you can be flexible about where training is done and who does it.

Projects that are located in remote areas with few adoptions in place that other adopters can observe (Level III projects on this dimension) may elect to either disseminate close to home or to make a concerted effort to establish satellite sites in scattered, accessible locations.

Another implication of project location is the type of agency in which the project is housed. While D/Ds hosted by a local school district have the advantage of remaining close to the original implementation site where continued refinement is taking place, they may find that the LEA's other priorities take precedence over project dissemination. Again, careful negotiation of procedures, agreements, and expectations can help avoid some of the problems. If certified trainers are located at adopter sites in local school districts, their participation as

CTs needs to be carefully planned with their district administrators. Some D/Ds negotiate this in advance so that they only accept adopter sites that are willing to serve as a demonstration or satellite site.

6. Level of Demand for the Project

Projects rating themselves at Level I on this dimension are not struggling to establish a certified trainer system in the face of overwhelming demand, and demand for the project tends to be the primary motivator for a project to begin using certified trainers.

Projects at Level III may need to put the brakes on their dissemination activities long enough to establish long range plans for handling the demands, rather than continually trying to meet as many of them alone as possible. If the requests from potential adopters are coming from all over the country, establishing satellite sites or identifying certified trainers in geographically strategic locations may be necessary.

7. D/D Project Goals for Adoptions

Modest goals (Level I) offer the greatest flexibility in terms of the urgency for establishing a certified trainer system and the approach used. If the project has added several new target groups (out-of-state, urban or rural, private schools), then increasing the number of individuals who are excellent at conducting awareness and making sure they are located near new target populations will be important.

If the project seeks a substantial increase in the number of new adoptions (Level III) without placing great importance on the type of adopter they attract, then identifying certified trainers with high initiative taking skills may be important, particularly if they are associated with agencies that will increase project exposure (such as SEAs or SFs). Ambitious goals for adoption also suggests that the project's certified trainer system ought to be capable of producing several CTs quickly and effectively.

8. Staff Preparation

If the D/D staff is small, unable to get ample release time, not enthusiastic about conducting training or travelling, and lacking skills in key dissemination areas (Level III), the project should seriously consider devoting ample energy to developing an extensive certified trainer system.

Level I projects -- newer ones with great interest in conducting dissemination activities and the need to gain experience in doing so before they can prepare certified trainers -- may do well to move slowly toward developing a CT system. This is not to say they ought to ignore the task; long range planning can save substantial time and difficulty when the demands on staff increase.

9. Project Rationale

A certified trainer system is a means of helping a project meet its goals for dissemination. As such, the goals and rationale for the certified trainer system should be articulated clearly before the system is designed, or reviewed as the system is being refined. Level I projects -- those with a clear sense of what they want the CT system to do for them -- will need to spend less time on overall system planning than will projects at Level III. Level III projects should spend considerable time working out the framework of the certified trainer operation with all relevant staff.

10. D/D Concerns about CTs

Beginning to use certified trainers is an innovation for a D/D project and the impact of staff concerns must be understood and accommodated. Staff with many serious concerns about using certified trainers may resist the idea if the system proposed seems to aggravate these concerns. The project director should allow for ample time for staff concerns to be addressed both at the initial planning stage and as the certified trainer system becomes operational. (See the Concerns-Based Adoption Model: Stages of Concern in Adopting an Innovation.)

Projects that rated themselves at Level I on this dimension, however, should not necessarily rest easy. Often concerns do not emerge until people involved in implementing a change learn more about how it will affect them and the assumptions it represents. Anticipating concerns and planning how to address them can be a good investment of time at the beginning.

General Considerations for Designing or Refining Certified Trainer Systems.

This sub-section can be thought of as a planning procedure. By considering each of the items below, an overall design for your certified trainer system will take shape.

An important set of references for conducting this exercise is the set of certified trainer strategies contained in Section 4. The items in this section will raise questions about the general parameters of the system; the strategies will give you alternative approaches for each component area.

The first set of design consderations relate to the overall system. Each of the components of the system is then addressed.

1. SYSTEM PLANNING CONSIDERATIONS

1.1 For what function(s) is the demand on the project staff the greatest and which are staff least able to meet (Awareness, Training, Evaluation, Follow-up)? What functions could be performed by CTs so that staff time would be released for other functions not as effectively transferred to CTs? What can CTs realistically be expected to do?

1.2 Considering the functions CTs will be playing, the level of demand for adoptions, and amount of time each CT will be able to spend on the project, how many CTs does the project need? Where should they be located to provide the greatest help (i.e., in distant states where D/D travel costs would be prohibitive)?

1.3 Should CTs operate as individuals who go to the adopter site exclusively or should demonstration or satellite sites be established from which certified trainers would conduct activities?

1.4 Who should be involved in designing and planning the system? Who should have primary responsibility for its development.

2. IDENTIFYING

2.1 What characteristics must a certified trainer have in order to be effective? How can these be determined?

2.2 Beyond skills and characteristics, what other criteria must be considered (availability, experience in implementing the project, geographic location)?

2.3 Assuming ideal certified trainer candidates will be hard to find, what are the most important criteria to look for?

3. TRAINING

3.1 What do certified trainers need to know in order to effectively train in the project? What skills must they have? (Don't forget knowledge of the NDN, the adoption process, the services available from the D/D and SF, presentation skills, the ability to respond quickly to unexpected changes in conditions.)

3.2 What are the most effective means of equipping CTs with these skills and knowledge.

3.3 What resources are available for training certified trainers (time, money, materials, people, experiences)?

3.4 What materials could be assembled or developed to support the preparation of certified trainers?

4. CERTIFYING

4.1 What are the standards that must be met in order to be certified? (Skills, knowledge, availability, rate of payment, attitude, commitment, etc.)

4.2 What evidence can be sought to verify the existence of these criteria?

4.3 How can this evidence be obtained? How should it be analyzed?

4.4 What are the step-by-step procedures that lead to certification?

4.5 Who should make the final determination as to whether a trainer is certified?

5. FUNDING

5.1 How much money will be needed to operate the certified trainer system? What are the specific cost items?

5.2 What funding sources currently support dissemination activities? Can these be diverted to cover costs of certified trainers?

5.3 What other potential funding sources can be tapped -- state, private, local, federal.

5.4 What forms of "in-kind" services arrangements can be tapped?

5.5 What are the implications of various funding possibilities in terms of control, coordination, needs, administrative burden, reliability, etc.?

5.6 What are the procedures for accessing the desired funding?

6. SUPPORTING

6.1 Assuming that certified trainers and CT systems are not entirely self-sustaining, what support needs can be anticipated (i.e., loss of enthusiasm, loss of confidence, sloppy training, ignoring procedures and policies, not being current on project developments, not communicating with D/Ds)?

6.2 What methods can be used to avoid these problems by supporting certified trainers?

6.3 What time, money, or other resources will be needed to carry out support activities?

7. COORDINATING

7.1 What coordination functions need to be performed to manage the certified training system?

7.2 Who should perform the various coordinating functions?

7.3 How much time will these tasks take?

7.4 What records need to be kept to coordinate the system? Who should create them?

7.5 What is the overall procedural plan for the CT system (step-by-step flow of activity)?

7.6 What policies, or guidelines, should CTs, SFs, and adopters be expected to follow in using CTs? How can these best be communicated?

7.7 What methods of communication should be the basis of coordination (telephone, newsletter, visits, reports, group meetings)?

8. RECERTIFYING

8.1 How long is trainer certification valid? Rationale?

8.2 What questions should be answered through recertification?

8.3 What should be required of certified trainers to be recertified?

8.4 What should be done about CTs who do not meet recertification requirements?

8.5 To what extent can the recertification strategy accomplish retraining, support, and evaluation functions as well?

9. EVALUATING

9.1 What are the overall objectives of our certified training system?

9.2 What questions do we have about its effectiveness?

9.3 How can these questions best be answered (sources of data, procedures for collecting and analyzing)?

9.4 What components seem to need further development?

9.5 How can the evaluation of our certified trainer operation contribute to the evaluation of the project's dissemination activities as a whole (management implementation, and impact)?

Section 5: ISSUES

The evolution of certified trainer operations in the NDN has largely been the result of individual Developer/Demonstrators and State Facilitators responding to needs and conditions as they emerged. It is not surprising, therefore, that the approaches and procedures in use today within the NDN represent enormous diversity.

With that diversity has come the need for greater clarity on several issues pertaining to the use of certified trainers. While there has been much dialogue among NDN members, there has not been a concentrated effort to focus that dialogue in the interest of charting clear cut directions for the future.

This Guidebook is part of that effort. Other sections of it address current practice in the NDN and procedures for improving practice. In this section, several issues of current importance are highlighted and discussed.

As work goes forward in the area of certified trainers, attempts will be made to move them toward resolution. Input from the field will be sought in several ways and used to formulate positions and recommendations. In this sense, this section is the least complete and most dynamic of the Guidebook. No doubt the issues presented here will be reformulated as work goes on and as clearer directions emerge. New material will be added as it is developed.

The NDN is a network of diverse and largely autonomous projects and individuals. The healthiness of this diversity must be preserved as common approaches are sought in areas where Network members are highly interdependent.

The issues selected for inclusion at this time are discussed below.

1. Should all Developer/Demonstrator projects use certified trainers?

While projects currently using certified trainers for one or more functions are clearly in the majority, the projects that do not rely on them state several reasons:

- the level of demand from adopters does not yet necessitate using other than D/D project staff.
- the project is new and has not fully organized or implemented its dissemination effort.
- project staff feel that the nature and scope of their project makes it difficult to find qualified persons to become certified trainers.
- some D/Ds who want to retain extensive control over the adoption process fear that turning over responsibility for training adopters to "outsiders" would lead to problems of fidelity, coordination, and authority.

Having a certified trainer system is not an end in itself -- it is a means of increasing the dissemination capability of a D/D project. Projects that are currently satisfied with the number of adoptions they are able to handle and resistant to using non-project staff for awareness, training, or follow-up are concerned that their continued funding will be jeopardized. Their concern raises a question -- is there or will there be a tacit or explicit NDN-D policy requiring projects to have certified trainer systems?

As we have noted elsewhere in this Guidebook, NDN-D has stated its reluctance to issuing such a policy at this time, since the specifications of it might inappropriately restrict certain projects. Yet the continuing struggle to create a secure funding base for the NDN highlights the importance of exploring all viable means of increasing NDN impact.

Perhaps a resolution of this issue for now is that projects currently without certified trainer systems seriously investigate the possibility of developing one; that those for whom demand has not yet become a sufficient motivator lay the groundwork now in anticipation of increased demand, and that those projects that have not found acceptable candidates seek assistance in exploring alternatives thoroughly.

2. Where certified trainers are used, what are the roles and responsibilities of Developer/Demonstrator, State Facilitator, and certified trainer?

   While the locus of control over the activities of certified trainers originates with the D/D, certain strategies seem to foster, over time, a shift in control away from the D/D to the certified trainer or the State Facilitator.

There are several aspects to this issue:

-- Some D/Ds have expressed concern that certified trainers for their project operate too independently -- arranging adoptions with the SF and not including or informing them, neglecting to submit required documentation about their activities or implementation data from the adopter, assuming responsibilities beyond those agreed to previously with the D/D. The D/D is thus unable to meet the responsibilities of assuring accountability and collecting implementation and impact data on adoptions.

-- In some cases, the SF wants to be able to insist on a particular certified trainer to do the training in his or her state, even if the D/D is available; in other cases, the SF will accept only the D/D in person.

-- Some certified trainers have found that D/D requirements of them have increased substantially over time and represent obligations they are not able to meet.

Because the conditions of every adoption are different, serious attempts on the part of D/Ds using certified trainers to establish strict procedures have often been thwarted. Every D/D in the NDN has to potentially deal with over 50 State Facilitators; every SF faces the possibility of dealing with over 90 D/Ds. Given these and other circumstances, it is remarkable that the NDN has developed operating procedures as efficient as those currently in use.

No doubt more can be done. Some NDN members suggest developing guidelines and procedures for using certified trainers -- indeed, for the whole adoption process -- that are agreed to and implemented Network-wide.

The very nature of the adoption process requires great flexibility and creativity in planning, negotiating, and implementing. SFs and D/Ds have tended to resist standardization, believing that no set of guidelines could effectively accommodate the idiosyncracies of most situations. However, the area of certified trainers is currently undergoing scrutiny in the NDN partly because the absence of reasonable Network-wide guidelines is increasingly an obstacle to efficiency, particularly as more and more certified trainers are used.

The issue of roles and responsibilities, and even of basic procedures, warrants the attention of NDN members, whose goal might be to articulate experimental guidelines that would be modified over time until they receive widespread acceptance.

3. If satellies sites are established as a means of providing awareness, training, and/or follow-up services, what autonomy can those sites legitimately have?

Questions have been raised about the autonomy of satellite sites that have adopted the D/D's full program. Satellite sites are, by definition, equipped to perform all or most of the project's dissemination role in addition to program implementation. The following concerns have been expressed:

-- If an adopter agrees to serve as a satellite site, and is used to demonstrate the program to and train other adopters, how much adaptation of the program can the satellite site make?

-- D/Ds become concerned about adaptation in satellite sites when program fidelity is questioned. Though some degree of adaptation is likely in most adoptions and certain adaptations are acceptable, there are boundaries that, if exceeded, may result in a project that is substantially different from the one the potential adopter heard about during awareness.

-- Satellite sites tend to attract attention by word of mouth and other means. Should satellite sites be allowed to disseminate the program to other adopters without coordinating their activities with the D/D? This question is especially problemmatic for D/Ds because of the importance of being able to "count" every program adoption. Further, the D/D bears the responsibility of quality control of the project, and to fulfill that responsibility must be assured that the program and the adoption process used at the satellite site meets all requirements. Some D/Ds are concerned that if their project is substantially adapted and then disseminated independently by the satellite site, they are being misrepresented and potential adopters are led to believe that the adaptation is a validated program.

-- Satellite sites for some projects have expressed interest in applying to the JDRP for validation. Should they be allowed to do so?

The recently issued JDRP Guidelines (effective March 2, 1982) address this question. Under a section entitled "Replications," the Guidelines state: "Approval by the Panel is for the given product or practice utilized under the conditions

> noted in the submission. The Panel will not review submissions from implementing sites that represent a replication of the same educational treatment already approved by the Panel." (U.S. Department of Education Joint Dissemination Review Panel, page 4.)

There seem to be two issues reflected by these questions. First, the issue of control over the satellite site -- the degree of adaptation it can legitimately make and still be a satellite of the original project, the dissemination activities it can engage in, its authority to pursue validation. Second, there is an issue of coordination -- how can the D/D be kept informed of and involved with the satellite site to the degree necessary to meet his or her requirements?

Several projects have struggled successfully with these questions and have developed agreements, procedures, and monitoring mechanisms to deal with them. Disseminating these successful methods will be an important task for the near future.

4. Should State Facilitators serve as certified trainers?

Several D/D projects have certified staff of SF projects to do awareness, training, and follow-up. Other D/Ds and some SFs believe that there is a role conflict inherent in this situation and that the practice ought not to be encouraged. A summary of the pros and cons follow to highlight the issue.

Pros: -- State Facilitators are logical people to conduct project awareness sessions. Since adopters often want the same person who led the awareness session to do the training, the SF is a logical choice.

-- SF staff thoroughly understand the dissemination/adoption process and tend to be very in tune with the needs of schools in their states -- far more so than certified trainers from other settings.

-- SF staff are often excellent trainers who are adequately prepared and have credentials in the content area of the projects they represent. They are usually evaluated very positively by the adopters they train. They are also skilled in providing follow-up services, since it is part of their role.

-- SFs are responsible professionals who understand the importance of role clarification and equitable representation of all D/D projects. They also understand the importance of coordination and documentation.

-- Many SFs who serve as certified trainers do so outside their own state. In such cases, the arguments about role conflict with adopters they serve as SFs do not apply.

-- As funding decreases, SFs need to look beyond their project budgets to cover staff. Serving as certified trainers keeps them fully involved in the NDN and assures that experienced SF staff can remain in their positions.

Cons: -- The SFs role requires them to concentrate on the dissemination/adoption process, and representing particular projects is confusing to potential adopters.

- SFs are not involved in implementing the projects they are certified in. This is an important perspective and adopters should not be deprived of it.

- SFs in private agencies, profit or non-profit, should not benefit financially from their work as certified trainers, since they are already funded to facilitate adoptions.

- SFs who represent a particular project in a category may be overemphasizing that project and not equitably presenting the other projects in the category that they know less about or in which they are not as invested. The result is a disproportionate number of adoptions for the project the SF represents.

The issue of State Facilitators serving as certified trainers does not lend itself to a black-and-white position. As the points above illustrate, there are many aspects to the question and a wide range of circumstances that suggest conditions under which using SFs as certified trainers is appropriate.

It is in the interest of the NDN to explore these conditions and arrive at some consensus about appropriate guidelines and caveats, since the reasons for using SFs as certified trainers seem to be increasing with emerging funding constraints and increases in the number of CTs overall.

5. How can SFs and adopters be assured of the quality of the certified trainer assigned to work with them?

Many D/Ds using certified trainers rely on very informal procedures for evaluating their effectiveness and for verifying the fidelity of their training. SFs have been concerned about the poor quality of some certified trainers, or the unknown quality of others they have not had direct experience with.

There are several strategies described in Section 3 that relate to the evaluation and recertification of certified trainers. The trend is toward evaluations that look at the implementation of the project in adopter sites where a certified trainer has done training, paying closer attention over time to the quality of the certified trainers work and the fidelity of both training and resulting adoptions. Some D/Ds are using quality control procedures that involve periodic observation, review of the implementation of the project at the adopter site, and periodic retraining. Addressing this important issue seems to call for considering these and other strategies carefully.

Certified Trainer Operations: Criteria and Procedures Used by Developer/Demonstrators

NDN TAB

CERTIFIED TRAINER OPERATIONS: CRITERIA AND PROCEDURES USED BY DEVELOPER/DEMONSTRATORS

The following descriptions highlight criteria and procedures used by Developer/Demonstrators in their certified trainer operations. Along with each description is an indication of the types of services certified trainers perform for the project and the types of sites established by the D/D. (Definitions of the types of sites are found in Section 1: OVERVIEW of the *Guidebook*.)

KEY

Services:

A = awareness
T = training
E = evaluation
F = follow-up

Sites:

a = adoption
d = demonstration
t = turnkey

ACTIVE: All Children Totally InVolved in Exercising

To become an ACTIVE-certified trainer an individual must be trained by a certified trainer, attain all course competencies and complete and submit all course requirements, "officially" implement one or more program components in the individual's school district, college, university, or agency ("officially" means that an agreement is submitted and ACTIVE classes are scheduled, universities and colleges may substitute an undergraduate or graduate course but must also have either a program involving children on campus, or be affiliated with a demonstration center); and implement ACTIVE "critical elements." Certification is awarded on a year-to-year basis to insure that trainers maintain optimum performance. Recertification requires annual submission of pre/post pupil data by an LEA and of pre/post student competency data by college or university, annual submission of an end-of-year report summing up the year's efforts and outlining plans for the following year, submission of quarterly reports, performance of other assignments on behalf of the D/D and SF, and evaluation of cadre team performance by the project director.

Services: A, T, E, F   Sites: a, d, t

ADULT PERFORMANCE LEVEL PROJECT (APL)

A trainer must be a successful implementer and/or coordinator at an APL site, participate fully in a trainers' workshop conducted by APL Project staff, and conduct one complete training workshop judged satisfactory by member of the APL staff. Successful candidates are certified as APL trainers in the APL Instructional System or in the APL Competency-Based High School Diploma Program.

Services: A, T, E, F   Sites: a, d, t

PROJECT ADVENTURE

Trainers must participate in and successfully complete a five-day Project Adventure Training Workshop, successfully implement the program elsewhere and show teaching ability, have the personal interest and enthusiasm deemed necessary to be a trainer and have the support of his/her professional supervisor, assist in a five-day training with D/D staff, and be judged qualified to conduct training activities by the D/D during that year.

Services: A, T, F   Sites: a, d, t

ALPHAPHONICS: BEGINNING READING PROGRAM

Trainer must attend awareness session and training workshop; assist with training; be enthusiastic about Alphaphonics and capable of imparting not only knowledge of the program but enthusiasm for it. Trainer must also have district support and ten days of release time. A visit to D/D site is desirable but not mandatory. Determination of trainer capability is made by D/D, contact person, and potential trainer.

Services: A, T, E, F   Sites: a, d, t

PROJECT CAP: Boston Mountains Educational Cooperative's Career Awareness Program

Certified trainers are selected from schools that evidence a high level of fidelity in implementation of the key elements of the CAP program. In addition, the school must submit testing data that shows student gains comparable to gains at the original project site. Trainers must have used the program in their classrooms or have been directly and actively involved in the supervision of the program. Potential trainers must attend a three-day trainer workshop at the project site and conduct a teacher workshop under the supervision of the project staff.

Services: A, T   Sites: a, d, t

CAREER DEVELOPMENT PROGRAMS

Trainers must have been career coordinators in the D/D career education program and must have received orientation to the NDN. They must participate in the local-site training program for adopting site's personnel and communicate with the adopting site on characteristics of participants to be trained and needs of group.

Services: A, T, E, F Sites: a, d,

PROJECT CATCH-UP

Turnkey trainers are selected from enthusiastic adopters who have implemented a very successful program and who have expressed an interest in National Diffusion Network goals. Each has participated in training in the adopting district, as well as the original site in Newport-Mesa, and each has participated in turnkey inservice.

Services: A, T, E, F Sites: a, t

PROJECT CHILD: Comprehensive Help for Individual Learning Differences

Trainers are all present or former project staff members who have been selected for their direct involvement in the project over a span of many years. Each individual has received additional training from the director in all aspects of the project so he or she can provide adequate training. A trainer may be able to provide training in only one component, or may be more involved and therefore able to train in several or all program components.

Services: A, T, E, F Sites: a

COMPREHENSIVE SCHOOL MATHEMATICS PROGRAM (CSMP)

Potential trainers attend a two-week training workshop at D/D site and then share responsibility with a D/D staff member for a local training workshop.

Services: A, T, F Sites: a, d, t

CONCEPTUALLY ORIENTED MATHEMATICS PROGRAM (COMP)

A certified trainer must have extensive knowledge of COMP and credibility with teachers. Trainers are permitted to conduct awareness and training sessions only at school sites within their approved geographic area; otherwise approval of the director is needed. Trainers may not certify others on behalf of the project. Upon completion of an awareness and/or training session, the trainer is responsible for submitting the required forms to the COMP office. Financial support for awareness and training activities must be negotiated between the trainer's agency and the school requesting the service. Project COMP will not be financially involved unless the services of the trainer are requested by the director.

Services: A, T Sites: a, d, t

COPE: Cognitively Oriented Pre-Primary Experience

A trainer is chosen when D/D and SF agree that the individual is able to impart the enthusiasm and spirit of the program, as well as demonstrate the use of curriculum materials and methods. In addition to having at least three years' experience in early childhood and/or special education, including classroom teaching, trainers must be comfortable with the program's philosophy and core elements. To be certified, they should assist an experienced trainer during at least two training workshops and conduct at least one workshop with the help of an experienced trainer. Because of the program's complexity, quality control is part of the process of trainer certification to assure SF, D/D, certified trainer, and all NDN participants that the Network's credibility is maintained.

Services: A, T, F Sites: a, d, t

PROJECT CREATION: Concern Regarding the Environment And Technology in Our Nation/Neighborhood

Certified trainers should be successful adopters or be involved with such an adoption. A trainer must be certified by D/D project director, with certification renewable on a yearly basis. Trainer will receive provisional certification until the D/D has had an opportunity for field observations. Trainer should visit D/D site if possible. Trainer will serve a specific geographic area. Two levels of certification: 1) trainer -- conducts awareness, trains, does follow-up and evaluation; 2) demonstrator -- makes awareness presentations at specific school sites for purposes of demonstrating the project to others.

Services: A, T, E, F Sites: a, d, t

CRITICAL ANALYSIS AND THINKING SKILLS (CATS)

Trainers must complete the 15-20 hour CATS inservice training, achieve a score of 80% on the final test, correctly score 10 final tests from another group that has taken the CATS inservice training, and conduct inservice training for at least 10 participants, 90% of whom achieve a score of 80% on the final test.

Services: A,T, E, F Sites: a

CURRICULUM FOR MEETING MODERN PROBLEMS (The New Model Me)

Qualified trainers participate in a two-day workshop conducted by project staff; demonstrate knowledge of program philosophy, approach, and content; have experience with affective education programs in general and/or with teaching The New Model Me, have experience in conducting training workshops or demonstrate training potential in workshops conducted by project staff; show confidence in trainer's role; and receive satisfactory subjective evaluation from project staff.

Services: A, T, E, F Sites: a, d

DIAGNOSTIC PRESCRIPTIVE ARITHMETIC (DPA)

The following criteria have been established: involvement in a minimum of three pre-implementation training workshops; attendance at three awareness sessions; visitation to original site; participation in DPA Trainers of Teachers workshop; involvement in implementation of DPA adoption as teacher and/or coordinator; educational philosophy consistent with DPA program; understanding of elementary mathematics and methodology; and letter of application, resume, and personal and professional references. In addition, the following qualities also will be considered: enthusiasm for the program; sensitivity to the needs of individuals in a group; professional manner; and energetic spirit.

Services: A, T, E, F Sites: a, d, t

PROJECT DISCOVERY

Trainers must have taught Project Discovery in a classroom setting; demonstrate organizational ability; and receive final qualification approval from Project Director.

Services: A, T, E, F Sites: a, d

DIVERSIFIED EDUCATIONAL EXPERIENCES PROGRAM (DEEP)

Trainer must successfully teach in a D/D classroom for at least one year (two years are preferable), complete a two-day training course by a D/D staff member, intern with a D/D staff member for a minimum of one training session, and receive certification by the project director.

Services: (NA) Sites: a, d

EARLY PREVENTION OF SCHOOL FAILURE

Trainers must have been involved one year in the EPSF program at the LEA level with evaluation results indicating successful implementation of all seven program components; involved in one-week leadership training seminar to demonstrate skills and competencies in training new participants in the EPSF program; have letter of endorsement from SFs and chief school administrators; participate in on-site visitations by the Peotone staff to the LEA site, and be recertified each year based on completing reports, ongoing program continued, and evaluation by those trained.

Services: A, T, E, F Sites: a, d, t

EARLY PREVENTION OF SCHOOL FAILURE MIGRANT PROGRAM (For Spanish and English-Speaking Children)

Trainers must have been involved for one year in the EPSF program at the LEA level with evaluation results indicating successful implementation of all seven program components; involved in one-week leadership training seminar to demonstrate skills and competencies in training new participants in the EPSF program; have a letter of endorsement from SFs and chief school administrators; participate in on-site visitations by the Peotone staff to the LEA site; and be recertified each year based on completing reports, ongoing program continued, and evaluation by those trained.

Services: A, T, E, F Sites: a, t

PROJECT ECOLogy (Environmental Career-Oriented Learning)

Trainer must have full understanding of program, have attended training sessions, have worked with program for one year, should have some background in education, teaching experience in environmental education, and should be experienced in giving presentations. No out-of-state trainers have been authorized to do training, evaluation, or follow-up to date.

Services: A Sites: a

ECOS TRAINING INSTITUTE (ETI)

Trainers must attend an ETI adoption workshop and an ETI trainers workshop and take a leadership role in establishing a satellite site, the major requirements for which are full-scale implementation of the ETI approach to curriculum infusion, installation of a mechanism for collecting appropriate data, availability of trainers, ability to receive visitors, and cooperation by administration.

Services: A, T, E, F Sites: a, d, t

PROJECT EQUALITY

Trainers authorized to disseminate Project Equality are selected by the project director and have met the following criteria: (1) have successfully implemented an adoption of Project Equality in a local school district, (2) have participated in the Project Equality inservice training, (3) are current professional educators, and (4) have been certified by the project director as authorized Project Equality representatives.

Services: A, T, E, F Sites: a, d, t

PROJECT ERIN: Early Recognition Intervention Network

Must be adopter trained by D/D; operate own demonstration site for a minimum of three years; observed by D/D staff to ensure the existence of compatible philosophy and goals; co-train at one training workshop; and attend annual D/D Leadership Training Institute.

Services: A, T, E, F Sites: a, d, t

EVERY CHILD A WINNER With Movement Education

Trainers must: complete a 12-month adoption cycle, be approved for training by the D/D, sign an agreement to comply with the D/D training requirements, attend a trainers' workshop, read all prescribed references, plan Phase I and II training, and be willing to be recertified after 12 months.

Services: A, T, E, F Sites: a, d

EXEMPLARY CENTER FOR READING INSTRUCTION (ECRI)

Regular trainers must have participated in initial, intermediate, and advanced levels of training and have taught using ECRI teaching techniques. Turnkey trainers must show a minimum of 120 hours in authorized ECRI courses, teaching experience and proficiency with students in ECRI classroom, administrative support, and that a trainer is needed in his or her area, and must present evidence of time available to teach, maintain contact with project, and demonstrate effectiveness in teaching teachers.

Services: A, T, E, F Sites: a, d, t

FOCUS DISSEMINATION PROJECT

Trainers must: demonstrate knowledge of the Focus model concepts, management design, and replication process; demonstrate in-depth understanding of "behavior problem" students and have direct contact experience working with troubled youth in either clinical and/or educational setting. After selection, must attend initial three-day workshop with D/D staff, followed by at least one field experience with D/D staff. D/D evaluates each trainer after one year to select those with highest potential for intern program. Intern trainers will attend advanced training to prepare for more in-depth activities (staff training and evaluation monitoring).

Services: A, F Sites: a, d

HOSTS: Help One Student To Succeed

Trainers are selected from among personnel of districts that successfully implement HOSTS for two years and provide evidence that students have benefited from the program. Trainers are selected and certified annually. All requests for trainers must be addressed to D/D.

Services: A, T, E, F Sites: a, d

INDIVIDUALIZED BILINGUAL INSTRUCTION (IBI)

Trainers meet project-specified criteria for conduct of training, observation, and monitoring for each of the seven program components.

Services: A, T, F Sites: a, d

INDIVIDUALIZED LANGUAGE ARTS: Diagnosis, Prescription, and Evaluation

Regional turnkey trainers conduct awareness and training activities in more than one district within a given area. Experienced teachers of language arts or English, with a strong commitment to the teaching of writing, attend at least two training workshops conducted by D/D staff, use the program in a regular classroom for at least six months, are monitored by D/D and SF while conducting awareness and training activities, attend periodic refresher workshops conducted by D/D staff, assist in the establishment and operations of regional satellite sites and sub-networks, monitor and evaluate adoptions in their area, and supply up-to-date information to D/D and SFs. In addition, every adopter is required, as a condition of acceptance for training, to designate a local turnkey trainer, generally an administrator whose regular duties include teacher observation and inservice, who works within the district to strengthen and extend implementation, conducts local monitoring, and serves as liaison between D/D and adopter.

Services: A, T, F Sites: a, d, t

INSTITUTE FOR CREATIVE EDUCATION

Trainers demonstrate outstanding teaching ability; an ability to interact easily with a wide variety of persons; a commitment to represent and maintain project concepts, philsophically and organizationally, with fidelity; and an ability to adapt to the perceived needs of persons involved. Potential certified project representatives must be trained by D/D staff at a two-day session and use the D/D project curriculum with the same class in a classroom for a minimum of 12 lessons. The D/D certifies trainers in awareness, training, evaluation, and follow-up, contingent upon participating and assisting the project staff in awareness and training workshops, as well as implementation of the curriculum on a regular basis. No project training shall take place without a certified project representative.

Services: (NA) Sites: a, d

INSTITUTE FOR POLITICAL AND LEGAL EDUCATION (IPLE)

Usually, IPLE trainers are invited by D/D staff to become a project representative. On occasion a teacher or State Facilitator may initiate the process. To qualify for IPLE certification a trainer must: participate successfully in a three- to five-day teacher training workshop; implement a quality IPLE adoption; demonstrate outstanding ability as an IPLE teacher in local district evaluation; participate successfully in a turnkey training workshop; receive evaluation ratings of 1 or 2 on the IPLE Workshop Evaluation Scale of 1-5; and agree to provide D/D with all pertinent information on training activities including names and addresses of participants, evaluation sheets, and expense incurred.

Services: A, T, E, F　　　　Sites: a, d, t

PROJECT INSTRUCT

Trainers must complete training as INSTRUCT teacher, have had successful experience as INSTRUCT teacher, complete training course, participate as trainer in team with supervising D/D staff member, and have had successful experience as a trainer.

Services: A, T, E, F　　　　Sites: a, d, t

PROJECT KARE (Knowledgeable Action to Restore our Environment)

Trainers must have participated in a KARE training workshop, operated a successful environmental studies program, served as a co-trainer with D/D staff, and had experience with evaluation activities and follow-up procedures.

Services: A, T, E, F　　　　Sites: a, d, t

LAW IN A CHANGING SOCIETY (LCS)

Trainers must participate in a trainer workshop conducted by present or former members of D/D staff and also must have conducted trainer workshops in their own school district or region. Certified evaluators have designed instrumentation, administered tests, and analyzed data on project effectiveness in Texas.

Services: A, T, E, F　　　　Sites: a, d, t

LEARNCYCLE: Responsive Teaching

Trainers must have acquired and used (for a minimum of six months) all Responsive Teaching skills; must have participated in a two-day Trainer's Workshop that demonstrated key training skills; must have successfully completed and received feedback on one training workshop in local area; and must be recertified every three years based on workshop data.

Services: A, T, F Sites: a, d, t

MATCHING ATTITUDES AND TALENTS TO CAREER HORIZONS (MATCH)

Trainers must have taken part in a successful adoption as a teacher or coordinator, be highly recommended as a potential trainer, receive approval from D/D staff, sign a mutual agreement with their regular employer and D/D, receive training from D/D staff, and possess a trainer's kit and certificate.

Services: A, T, E, F Sites: a, d, t

MEDIA NOW

Trainers must have taught Media Now in a classroom and/or successfully completed training from a D/D trainer, have a background in a media-related field (AV instruction, AV director, AV production, journalism, etc.), demonstrate organizational ability, and receive final qualification approval from the D/D project director.

Services: A, T, E, F Sites: a, d

THE ME/ME DRUG PREVENTION EDUCATION PROGRAM

D/D must observe trainer at work before trainer can work alone.

Services: A, T, F Sites: a, d, t

MODIFICATION OF CHILDREN'S ORAL LANGUAGE

Trainers must be trained and certified to use the language curriculum, demonstrate ability to work well with peers. The next step is to become certified as an in-house trainer: must demonstrate ability to train others successfully on a one-to-one or small-group basis, then co-teach a group of 20-25 with an experienced trainer, demonstrate ability to function successfully in a large-group training situation.

Services: A, T, E, F Sites: a, d, t

THE NEW JERSEY WRITING PROJECT

All certified trainers must participate in the summer teacher-training institute, have knowledge of current research on the composing process, and successfully conduct an institute.

Services: A, T, E, F   Sites: a, d

OCCUPATIONAL VERSATILITY (O.V.)

O.V. trainers have teaching experience in industrial arts and have had on-site training at demonstration sites in Washington state. Each trainer is an independent agent and should be contacted directly to ascertain availability and costs.

Services: A, T, E, F   Sites: a, d, t

OKLAHOMA CHILD SERVICE DEMONSTRATION CENTER FOR SECONDARY LD STUDENTS

Trainer must adopt and implement program for one year (minimum), and satisfy the requirements of the turnkey trainer certification form (available upon request).

Services: A, T   Sites: a, d, t

OMBUDSMAN

Prospective trainers must either attend turnkey training after having taught Ombudsman, or co-facilitate an Ombudsman training with D/D staff after having taught Ombudsman.

Services: A, T, F   Sites: a, d, t

PARENT READINESS EDUCATION PROJECT (PREP)

Trainer must have worked one year in an approved adoption site, attend project training, and train with a project staff member.

Services: A, T, E, F   Sites: a, d, t

PEGASUS-PACE: Continuous Progress Reading Program: Personalized Educational Growth And Selected Utilization of Staff - Personalized Approach to Continuous Education

Associate trainer applicants can be school supervisors, administrators, or teachers. They must participate in the implementation of the PEGASUS-PACE program, attend a two- or two and one-half day demonstration/training workshop conducted by an officially certified PEGASUS-PACE trainer, attend a three and one-half day associate trainers' workshop conducted at the D/D site, and successfully complete a written evaluation related to the key elements of the PEGASUS-PACE program.

Second-generation trainer applicants can be school supervisors, administrators, or teachers. They must submit a formal application to the PEGAGUS-PACE office and receive approval to participate in a second generation trainers' workshop, attend a two and one-half day training session conducted by an officially certified PEGASUS-PACE trainer, have participated in the implementation of the PEGASUS-PACE program for at least one year, participate in a four and one-half day training session conducted by a member of the original D/D staff (if the applicant is a certified associate trainer, an additional one and one-half days of training is required), pass a written evaluation of skills needed to conduct project workshops, and agree to commitments negotiated in the Memorandum of Agreement for Trainers.

Services: A, T, E, F Sites: a, d, t

PEOPEL: Physical Education Opportunity Program for Exceptional Handicapped Learners

Trainers must implement PEOPEL successfully in their school or district or be involved in implementation and maintenance; attend PEOPEL start-up staff training session conducted by D/D; meet with SF to become familiar with NDN, SF projects, D/D project, and awareness, training, evaluation, and follow-up procedures and responsibilities.

Services: A, T, E, F Sites: a, d, t

PERCEPTION+

Trainers must be associated with an LEA or SF, have had a minimum of one-year experience with Perception+ if associated with an LEA, have approval of SF, have thorough knowledge of and be commited to the philosophy and rationale of the program, be certified by the project staff to ensure adequate knowledge and presentation ability before first presentation. SFs may be trainers if adoptions have functioned successfully in their states for at least one year.

Services: A, T, F Sites: a, d, t

THE PORTAGE PROJECT: A Home Approach to the Early Education of Handicapped Children

Trainers must have been trained in the Portage model, must have successfuly taught the Portage model for two years, must have a degree in special education or a related field, and must have attended a certified trainers' workshop and/or been a member of the D/D outreach staff.

Services: A, T, E, F   Sites: a

POSITIVE ALTERNATIVES TO STUDENT SUSPENSIONS (PASS): A Validated Pupil Personnel Services Demonstration Project

Trainers have advanced training in transactional analysis, reality therapy, values clarification, and behavior modification. They know how to set up and run a time-out room. They understand and use D/D-developed concepts of the School Survival Course and humanistic activities in the classroom.

Services: A, T, F   Sites: a, d, t

POSITIVE ATTITUDE TOWARD LEARNING (PATL)

Trainers participate in PATL Kit Advisor training, facilitate two small groups of local teachers in the PATL process for a minimum of one year, attend a regularly scheduled PATL training session, read eight books related to PATL training, serve as co-trainer with a PATL-Bethalto trainer, conduct two-day communication-management training for a group of Kit Advisors, receive a mean score of two or higher on training evaluation form, and obtain consent of superintendent of LEA to excuse trainer for 10 days during school year.

Services: A, T, E, F   Sites: a, d, t

PRE-ALGEBRA DEVELOPMENT CENTERS

Certified trainers are selected and/or approved by the SF in their state. Trainees must participate in a 30-hour certified trainer workshop, be approved by certified trainer workshop coordinator as being prepared to serve as a certified trainer, and be willing to perform certified trainer duties.

Services: A, T, E, F   Sites: a, d

PRECISION TEACHING PROJECT

Certified trainers must receive initial training from project staff; observe a second training session to gain information on training techniques and materials; implement the process for at least one year; conduct a full training session while being observed by D/D staff; take part in follow-up as a participant, observer, and trainer; observe an awareness session presented by D/D staff; conduct an awareness session. Trainers may be certified in any of three areas, depending on training and ability.

Services: A, T, E, F   Sites: a, d, t

PROJECT R-3: Readiness, Relevancy and Reinforcement

Trainer selection is based on knowledge of program, administrative approval, and willingness to travel to demonstration site to be trained. Trainers are certified for specific components.

Services: A, T, E, F   Sites: a, d, t

READING ENGLISH ROTATION PROJECT

Requirements for trainers: RER Project successfully operated in district for a minimum of two years; trainer involved in project for a minimum of two years; trainer has worked in RER Project that is serving as an RER satellite, has had RER Satellite Training, and has completed RER Turnkey Trainer training.

Services: A, T   Sites: a, d, t

THE RUTLAND CENTER -- DEVELOPMENTAL THERAPY MODEL FOR TREATING EMOTIONALLY DISTURBED CHILDREN

Trainer must complete the Advanced Training in Developmental Therapy provided by the Developmental Therapy Institute and meet the following requirements: learn the basic content of Developmental Therapy, master the Developmental Therapy Objectives Rating form, develop skill in individual supervision of a trainee learning Developmental Therapy, develop skill in conducting group training session, and demonstrate proficiency in using the Developmental Therapy Verification form.

Services: A, T, E, F   Sites: a, d

149

SCHOOL HEALTH CURRICULUM PROJECT (SHCP)

Training coordinators responsible for teacher-training workshops must have taught the program or been trained in it; have experience working with administrators and community organizations, securing funding, coordinating acquisition of materials, arranging travel for teams, scheduling events, giving workshops, teaching health content, supervising and helping adopters. Teacher trainers, who help training coordinators, must have had classroom teaching experience, been trained by D/D teacher trainer, taught in D/D program, or helped a D/D program teacher.

Services: A, T, E, F Sites: a, d, t

SCHOOL VOLUNTEER DEVELOPMENT PROJECT

Turnkey trainers are selected from those who have served as full-time SVP coordinator; successfully installed SVDP model in school or district; and maintained a program in operation for at least one year. Turnkey trainers can provide all services.

Services: T Sites: a, d, t

SEQUENTIAL PHYSICAL EDUCATION REFORM: The M-5 Project

Trainers must have been involved with program at least one year, have some background in physical education, have attended training session for trainers, and have release time from local setting.

Services: A, T, F Sites: a, d, t

PROJECT SKI*HI: Programming for Hearing-Impaired Children Through Amplification and Home Intervention

Project surveys people who received basic training and have used the program two to three years to identify those doing an outstanding job. Those identified are invited to receive training and are given teaching materials.

Services: A, T, F Sites: a, t

STAMM: Systematic Teaching And Measuring Mathematics

Trainers must have recommendation from NDN-related programs, training as a participant, team teaching with certified trainer, and satisfactory evaluation by participants.

Services: A, T, E, F Sites: a, d

STUDENT TEAM LEARNING: Intergroup Relations [includes Teams-Games-Tournament; Student Teams-Achievement Divisions (STAD): Language Arts; and Jigsaw]

National trainers: previous involvement with program research and development or extensive experience in its use; availability to travel out of state. Local trainers: experience with program and in staff development. All certified trainers: demonstrated interest in, enthusiasm for, and knowledge of program. All must have received training for workshop leaders and must follow Workshop Leaders Manual provided by D/D.

Services: A, T, F Sites: a, d, t

TALK: Teaching Activities for Language Knowledge

To become certified, a trainer must fulfill six of the first eight criteria: (1) show interest in such a position, (2) have a background in oral language communication skill development, (3) have attended a two-day training workshop, (4) have implemented the TALK model (teach the TALK program two half-hours a week, follow lessons by classroom teachers for six months), (5) have worked with K-3 students using TALK lessons, (6) have successfully used the TALK program for one year with significant results, (7) be evaluated by a member of the D/D staff during an on-site visit, (8) have attended a trainer workshop. A trainer must also have signed approval from the local district superintendent.

Services: A, T, E, F Sites: a, d

THE TEACHING RESEARCH INFANT AND CHILD CENTER CLASSROOM FOR MODERATELY AND SEVERELY HANDICAPPED CHILDREN

Sites with training needs that exceed the capacities of the demonstration site, or where it is more cost-effective, are eligible to become a satellite site of the Teaching Research Model. There are nine phases of activity involved in developing the capacity to train others. Each phase is evaluated, and only those who meet the established criteria continue in the program. Each satellite must be recertified on an annual basis. A satellite site consists of a demonstration classroom and a certified trainer.

Services: A, T, E, F Sites: a, d, t

URBAN ARTS PROGRAM

Trainers must have six days of training for adoption, participate in adoption conference, have one year's management team experience with an adoption project.

Services: A, T, E, F Sites: a, d, t

U-SAIL: Utah System Approach to Individualized Learning

Training for all demonstration site trainers is conducted at the D/D site, at the demonstration sites, and via telephone conferences. Trainers provide operational follow-through for sites identified and serve as program liaison personnel for awareness conferences, initial training, follow-through, and in some instances, evaluation. The D/D's criteria for trainers are a minimum of one year's experience with implementation of program, training in implementation, and observable competency in program training. Requirements are modified for those conducting awareness only.

Services: A, T, E, F Sites: a, d, t

VRP: Reading Power in the Content Areas (Vocational Reading Power)

Trainers must meet the following criteria: have background in reading and experience in inservice training; work with a VRP adoption site for a minimum of one year; participate in a minimum of two VRP training workshops conducted by the D/D for on-the-job training; have consensus approval of SF, SEA, D/D, and trainer's employment agency.

Services: A, T, E, F Sites: a, d, t

Source: Far West Laboratory: NDN Developer/Demonstrator Directory, Third Edition, Summer 1981.

Criteria for Identifying Certified Trainers

CRITERIA FOR IDENTIFYING CERTIFIED TRAINERS

In addition to the more detailed descriptions of IDENTIFYING strategies, the following represents a comprehensive list of criteria used by D/Ds to identify certified trainers. The list can be used by D/Ds who want to consider additional criteria or by D/Ds establishing a certified trainer system for the first time.

Academic background in content area
Teaching experience in content area
Training/experience in conducting inservice
Success as an adopter (usually minimum of one year's impact data and evidence of fidelity)
Participation in adopter training
Co-train adopters with D/D
State Facilitator approval
SEA approval
Employer approval (LEA or other)
Availability for a minimum number of days per year
Group process/leadership skills
Reasonable fee
Willingness to travel to adopter site
Achievement of minimum score on an evaluation
Read material related to the project (books, articles)
Dynamic presentation style
Philosophical support of D/D program
Participation in CT training session
Successful adopter training session conducted
Committment to collect and submit implementation and impact data from adopter site
Possesses desired personal qualities: warmth, enthusiasm, sense of responsibility, poise, high credibility
Has visited the D/D site
Familiarity with the NDN and support of its goals
Submission of personal and professional references
Establishment of a demonstration site
Need for CT in applicant's geographic area
Willingness to train other CTs

Certified Trainers: Problems, Issues and Learnings

CERTIFIED TRAINERS: PROBLEMS, ISSUES AND LEARNINGS

A summary of a session on certified trainers held at the 1979 mid-winter Conference at San Antonio.

Report prepared by:
John Collins, Jon Kaiser
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CERTIFIED TRAINERS: PROBLEMS, ISSUES AND LEARNINGS

In an interview on the future of the National Diffusion Network reported in the NDN Reporter, Lee Wickline stated, "We must train certified trainers to relieve some of the load and strain now being placed on Developer Demonstrators and State Facilitators. By this, I mean successful adopters of the original developer demonstrator project who have the credibility to serve as trainers. We would like to have one such trainer in each of the 10 federal regions of the country."

The concept of a developing network of past adopters to train future adopters remains one of the major structural changes that the NDN must anticipate and deal with. The staff of the Massachusetts Facilitator Project and the Director of the Maine Facilitator Project conducted a session at the mid-winter NDN conference on this issue to underline their support of Dr. Wickline's concerns. This report is the summary of this session. We are presenting it in written form because we feel that "the certified trainer issue" is an important one and should be discussed widely.

The session presented in San Antonio was described on the conference agenda as follows: Certified Trainers: Issues, Learnings and Problems. This session will consist of a series of short presentations and group discussions on the following issues: processes and types of certification, support for trainers, insuring fidelity of adoptions, and characteristics of successful trainers.

At the beginning of the two hour session each of the four presenters (Denise Blumenthal, Jon Kaiser, and John Collins of the Massachusetts Facilitator Project and Bob Shafto of the Maine Facilitator Project) provided some background on the issues. The participants then completed an inventory entitled, "Assumptions About Certified Trainers." (A copy of this assumption inventory, with a summary of responses, is included at the end of this report.) The total group then broke into four discussion groups. The goals of these groups were to discuss the issues generated by the assumption inventory. The sessions concluded with brief summaries from each of the small group discussions. In the following pages, we will summarize the results of the inventory, suggest next steps or recommendations, and make some general observations.

Results of the assumption inventory:

Participants in this session were asked to hand in their inventory so they could be tallied. Based on the tally of the 33 inventories that were returned to us, reactions to the items can be summarized as follows:

Almost all the participants agreed with this one statement, "certified trainers are the most cost effective way to deliver training to schools."

The majority of participants agreed with these statements:

- Before a trainer is certified he/she must visit the original D/D site.

- For D/Ds the ultimate goal should be to have a certified trainer in each state.

- Certified trainers should be responsible for all record keeping and reporting to the D/Ds.

These statements were highly controversial: as many participants agreed as disagreed.

- Converts are the best proselytizers.

- Certified trainers should be required to retrain once every year.

- The single most important characteristic of a certified trainer is his/her enthusiasm.

- Selecting and/or recruiting trainers is the toughest job a D/D will face.

- When selecting a trainer it is more important to select someone with excellent training skills than with expert knowledge of the content.

- A certified trainer can or should train other certified trainers.

The majority disagreed with these statements:

- Every D/D loses something in the translation.

- A good judge of effectiveness of a new D/D is how many certified trainers the D/D has.

- State Facilitators should pay certified trainers.

- The State Facilitators should pay for all materials a certified trainer uses during training.

Almost all the respondents disagreed with these items:

- A certified trainer cannot really capture the spirit of the program.

- D/Ds should pay certified trainers.

- A D/D should not necessarily be the certifying agency.

- Adoptions acquired through certified trainers should not count.

- Most projects in the NDN do not lend themselves to certified trainers.

- Once a trainer is approved, he or she is approved for life.

Suggested Recommendations:

During the discussion section, the four group leaders were asked to record any recommendations that seemed to meet with the general approval of the group. Here's our summary of these recommendations:

1. The best title for one who does training for a Developer/Demonstrator but is not the actual developer and who is usually from a site other than the developer's home base is "certified trainer."

2. Developer/Demonstrators should consider levels of certification rather than a blanket certification; that is, certifying individuals to do awareness, to do actual training, to offer consultation after training, and to provide evaluation consultation, or some combination of the above.

3. That the certification process be considered a joint responsibility of both the Developer/Demonstrator and the State Facilitator. Since the Developer/Demonstrator will be doing the training and determining the competency of the certified trainer in the content area, the D/Ds are the first and most necessary step; but since the State Facilitator must work with and coordinate the efforts of the certified trainer, the State Facilitator should also be closely involved in the selection and certification process.

4. That the Developer/Demonstrators put in writing the essential characteristics that are required (formal education, teaching experience, class work or other indicators of content knowledge base, etc.). Also, that State Facilitators also develop a list of these characteristics if and when appropriate.

5. That Developer/Demonstrators develop a training manual with scripts for awareness, agendas for training, overheads, etc., to make it as easy as possible to "package" training and to insure that basic and/or criteria/information is clearly disseminated.

6. That the Developer/Demonstrators generate a WHAT HAPPENS IF... LIST that would cover many contingencies that potential adopters face. This list would help certified trainers respond to the most common programmatic and logistical questions in a uniform and reasonable way.

7. That certified trainers must be given a clear sense of what support potential adopters can expect from both State Facilitators and from the Developer/Demonstrator. The major problem could arise if certified trainers generate unrealistic expectations.

8. Support of certified trainers should be clearly stated in writing: Who pays for the certified trainers' time, handouts, training materials, secretarial help, postage, and even the coffee for the training should be clearly spelled out.

9. That the Developer/Demonstrators and the State Facilitators should do everything possible to eliminate "maverick" trainers from the system. Uncertified trainers doing widespread awareness and training without the support and/or knowledge of the NDN community could lead to a breakdown of a system that has taken five years to develop.

10. That Developer/Demonstrators and State Facilitators take every opportunity to share training, training designs, documentation systems, new learnings, and problems with one another so that the NDN can benefit from the individual experiences.

11. That the State Facilitators and Developer/Demonstrators begin experimenting with procedures to handle third and fourth generation certified trainers; that is, trainers who are trained as trainers by certified trainers.

GENERAL OBSERVATIONS

Based on the tone of the discussions and the type of recommendations and concerns that were generated, the session leaders feel the following statements seem to reflect the current state of affairs:

1. That a substantial number of Developer/Demonstrators have or are developing systems for certified trainers.

2. That some State Facilitators have taken the initiative and pushed Developer/Demonstrators to certify trainers in their states.

3. That the Office of Education is sanctioning the above two developments.

4. That attitudes towards and processes for certifying trainers are extremely diverse and that in any group of 15 D/Ds one could find almost all opinions regarding the worth of certified trainers.

But observations are not policy, and sometimes practice evolves without sufficient analysis; therefore the session leaders are recommending these general next steps for both Developer/Demonstrators and State Facilitators:

1. If you found yourself in the minority on one of the assumption statements, in your feelings regarding the observations, or in your attitude about some of the recommendations, mobilize your forces and begin to discuss your feelings with others. You may wake up some morning and find that there is a policy in effect that you can't live with.

2. If you agree with some of the observations start collecting data on your own results. For example, student achievement data of the schools where teachers were trained by the original D/D versus achievement data of the schools trained by certified trainers.

3. Experiment with as many different variations of trainers and circumstance as possible and keep an open mind.

4. Share the assumption inventory with your staff. We found it to be a helpful tool in clarifying values and feelings and developing definitions in this important area.

5. Be mindful of the vast differences among D/Ds and SFs. No matter how logical a conclusion may sound, there is probably more than one project or facilitator operation that would make a strong exception.

ASSUMPTIONS ABOUT CERTI[illegible] TRAINERS

1. Before a trainer is certified he/she must visit the original D/D site. (C)

1 - 8 2 - 4 3 - 9 4 - 12
False True

2. A certified trainer cannot really capture the spirit of the program. (C.T.)

1 - 27 2 - 5 3 - 1 4
False True

3. Every D/D loses something in the translation. (In. F.)

1 - 8 2 - 12 3 - 11 4 - 2
False True

4. Certified trainers are the most cost effective way to deliver training to schools. (S.)

1 - 1 2 - 2 3 - 12 4 - 18
False True

5. For D/Ds the ultimate goal should be to have a certified trainer in each state. (C)

1 - 8 2 - 4 3 - 8 4 - 12
False True

6. Converts are the best proselytizers (C.T.)

1 - 3 2 - 11 3 - 11 4 - 8
False True

7. A good judge of effectiveness of a D/D is how many certified trainers it has. (C)

1 - 16 2 - 9 3 - 8 4
False True

8. D/Ds should pay certified trainers. (S.)

1 - 12 2 -10 3 - 6 4 - 5
False True

9. A D/D should not necessarily be the certifying agency. (In.F.)

1 - 26 2 - 5 3 - 1 4 - 1
False True

10. Certified trainers should be required to retrain once a year. (In.F.)

1 - 6 2 - 10 3 - 10 4 - 7
False True

11. Adoptions acquired through certified trainers should not count. (In.F.)

1 - 31 2 - 1 3 - 1 4
False True

12. A good judge of the effectiveness of a S.F. is how many certified trainers the State Facilitator has in his/her state. (C)

1 - 22 5 3 - 4 4 - 2

13. S.F.s should pay certified trainers (S.)

1 - 10 2 - 8 3 - 8 4 - 6
False True

14. Most projects in the NDN do not lend themselves to certified trainers. (In. F.)

1 - 21 2 - 11 3 - 1 4
False True

15. Once a trainer is approved, he/she is approved for life. (In.F.)

1 - 25 2 - 3 3 - 4 4 - 1

16. A certified trainer can/should train other certified trainers. (C)

1 - 15 2 - 2 3 - 13 4 - 3
False True

17. The certified trainer should be responsible for all record-keeping and report back to the D/D. (S.)

1 - 2 2 - 3 3 - 9 4 - 19
False True

18. The single most important characteristics of a certified trainer is his/her enthusiasm. (C.T.)

1 - 5 2 - 10 3 - 11 4 - 6
False True

19. The S.F. should pay for all of the materials a certified trainer uses during training. (S.)

1 - 12 2 - 9 3 - 7 4 - 4
False True

20. Selecting and/or recruiting trainers is the toughest job a D/D will face. (C.T.)

1 - 6 2 - 14 3 - 9 4 - 3
False True

21. When selecting a trainer it is more important to select someone with excellent training skills than expert knowledge of the content. (C.T.)

1 - 9 2 - 10 3 - 11 4 - 4
False True

The biggest single problem to overcome when using certified trainers is..........

The best name for someone who did not develop a project but teaches others how to "do" that project is..........

Selected References on Dissemination

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